

PayPunch

User Guide

Time and Attendance Tracking System

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Chapter 1 Introduction

PayPunch is a feature-rich time and attendance tracking software that works with a biometric device to track:

- Employee start and stop work times
- Absences
- Tardiness
- Overtime
- Holidays
- Vacations

The purpose of this document is to guide you through the process of setting up your organization structure in PayPunch, creating reports, and managing employee time and attendance.

Intended Audience

This guide is for administrators, managers, supervisors, or anyone who is responsible for setting up, managing, or monitoring the PayPunch attendance tracking software and PayPunch reports.

What's New?

PayPunch, version 7, provides the following new or modified software changes:

- **New User Interface** – PayPunch appearance changes from MS Office 2003 to MS Office 2007. (*All Editions*)
- **Report Editor** – Provides the ability to modify current reports or create new reports. (*Enterprise Edition*)
- **Exceptions** – New capability exists to mark if exception hours should be counted towards overtime or not. (*Enterprise Edition*)
- **User Management** – Two new roles added: Department Supervisor and Department User. (*Enterprise Edition*)
- **Custom Accounting Period** – You can create custom time periods. (*Enterprise Edition*)

- **History Tracking** – Retains a history of manual changes in the system to the Employee Attendance and provides rollback capabilities. (*Enterprise Edition*)
- **Overtime Calculations** – Automatically calculate overtime hours (*Professional and Enterprise Editions*)
- **Customizable Export** – Allows exporting to custom Excel or CSV formats. (You can customize the export to match your accounting software such as ADP, QuickBooks, and more.) (*Professional and Enterprise Editions*)

Licensing

The number of PayPunch licenses purchased is based on the number of active employees. When an employee leaves the company, a new-hire can get the terminated employee's PayPunch License to avoid purchasing additional licenses. For more information, see Chapter 7, "**Managing Employees**".

Chapter 2 Installing PayPunch

Minimum System Requirements

Before you begin, make sure your system meets the following minimum requirements:

- Microsoft Windows NT, 2000, XP, 2003, or Vista
- Framework 2.0
- IBM compatible CPU with 300 MHz Intel Pentium processor, or faster
- 64 MB RAM (256 MB recommended)
- 50 MB free hard disk space
- 800 x 600 screen resolution with 16-bit high color, or above
- 10/100 MB network interface card
- Windows compatible printer

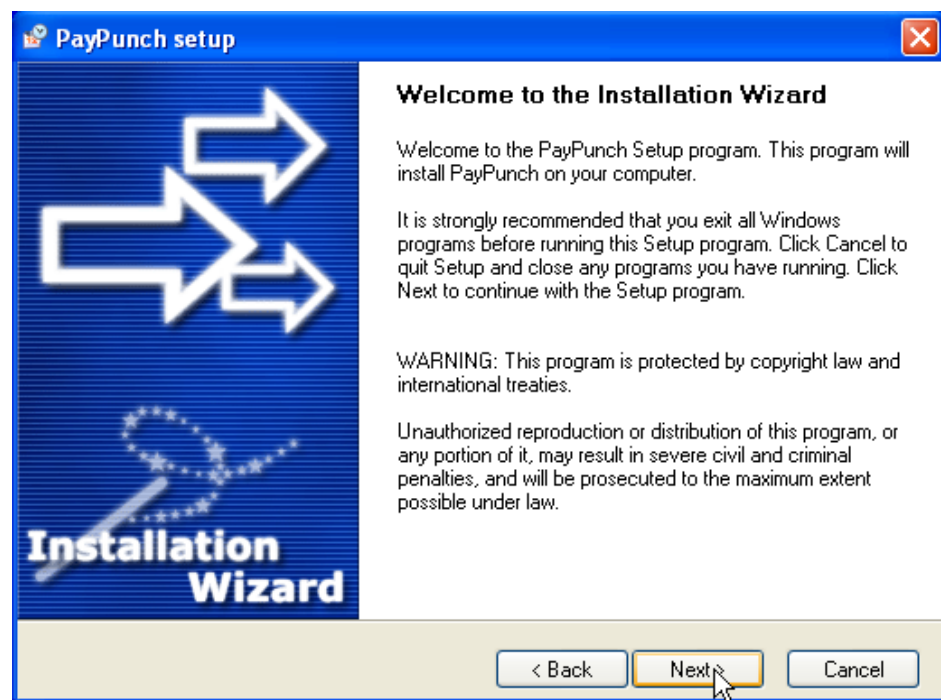
Downloading and Running the Installation Wizard

Use the following procedure to download and install PayPunch.

To Install PayPunch:

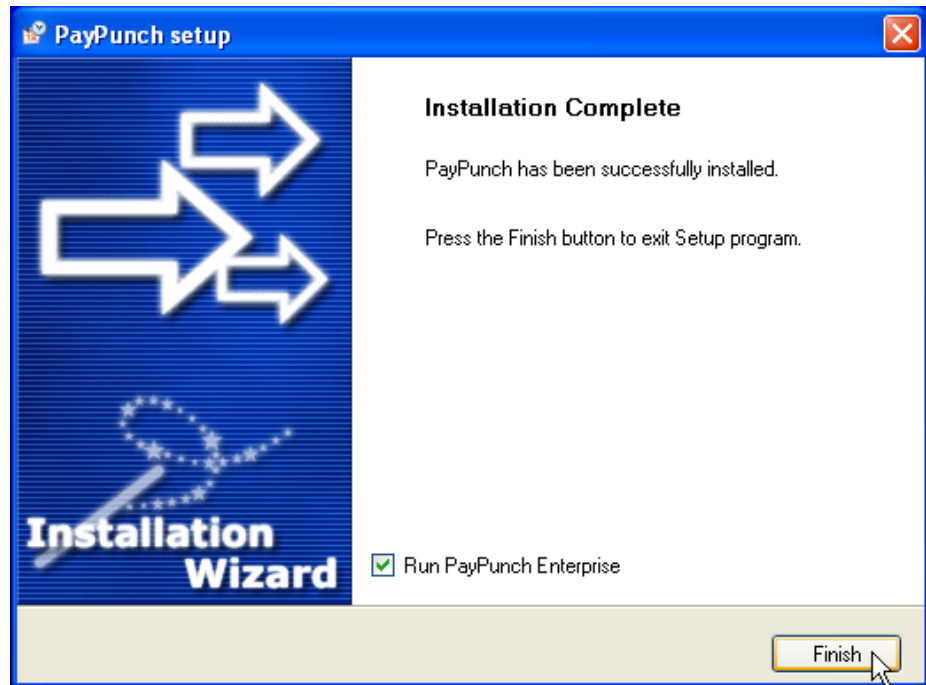
1. Download the program from the following URL:
www.paypunch.com/download.asp
2. Click on the installation file to begin the installation.
3. Click **Run** to begin the installation.

The Installation Wizard window displays.



4. Click **Next**.
5. If you agree to the License Agreement, click the **Yes** check box and click **Next**.
6. Continue following the directions in the **Installation Wizard**.

PayPunch is successfully installed when the following Installation Complete window displays.



7. Click **Finish** to end the Installation Wizard and run PayPunch.

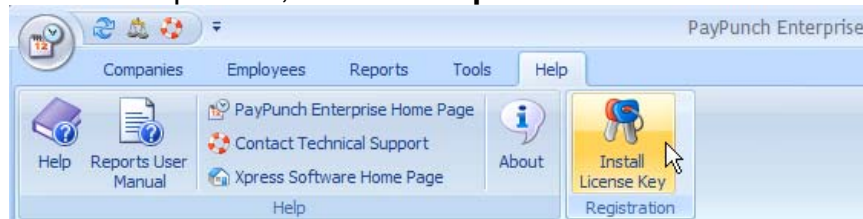
Note: If you do not want to run PayPunch after the installation, click the **Run PayPunch Enterprise** check box to uncheck the box and click **Finish**.

Registering Your PayPunch Software

Use the following procedure to register your PayPunch Enterprise software.

To Register PayPunch:

1. After you receive an email with the license key, save the attached .xml file anywhere on your computer.
2. Start PayPunch.
3. If you are launching PayPunch for the first time, create your username and password.
4. From the top menu, click the **Help** tab.

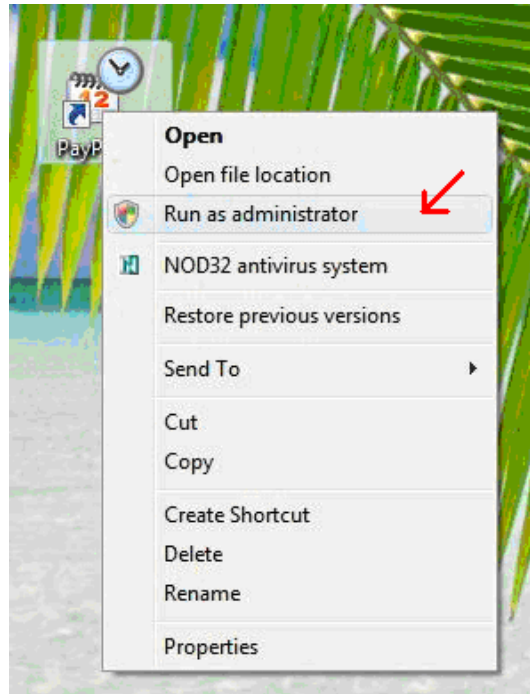


5. Locate and select the .xml file you saved in **Step 1**.
6. Click **Open**.
7. Your PayPunch software is registered.

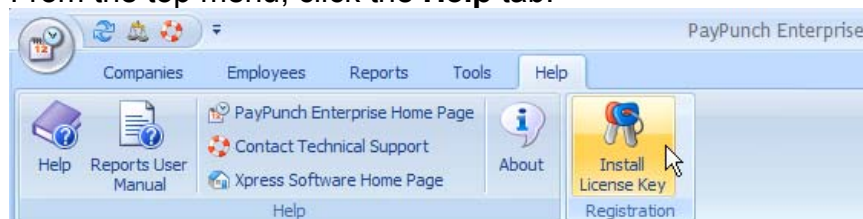
Note for Windows Vista Users:

In order to install the license key, administrator privileges are required. Use the following steps to start the PayPunch program as **Administrator**.

1. After you receive an email with the license key, save the attached .xml file anywhere on your computer.
2. Right-click the PayPunch icon and select **Run as administrator**.



3. If you are launching PayPunch for the first time, create your username and password.
4. From the top menu, click the **Help** tab.



5. Locate and select the .xml file you saved in **Step 1**.
6. Click **Open**.
7. Your PayPunch software is registered.

Refer to the user manual for the Universal Biometric Driver for information on ensuring your connection gets established between the computer and the biometric device(s).

Chapter 3 User Management (*Enterprise Edition Only*)

This section covers managing PayPunch user access privileges. From the **User Management** button in the **Tools** tab, you can to add, modify, or delete employees who are allowed to access the PayPunch software; or change passwords.

Defining User Permissions

The following table describes user roles and their corresponding access privileges.

Role	Access Privileges
General Supervisor	Administrator rights to all companies. The General Supervisor assigns all of the roles; including their login IDs and password.
General User	Read-only rights to run reports. The General User can view all companies, but cannot make any changes.
Company Supervisor	Administrator rights to one company.
Company User	Read-only rights for only one company and they can run reports for that company.
Department Supervisor	Administrator rights to only their assigned department; not all departments.
Department User	Read-only rights to their assigned department in order to run reports.

Adding, Modifying, or Deleting Program Users

This section describes how to:

- [Add a User](#)
- [Edit a User](#)
- [Delete a User](#)

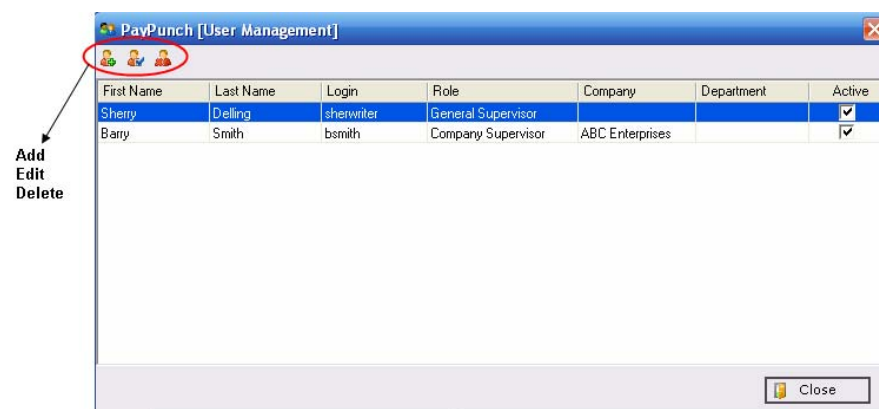
Adding a New User

Use the following procedure to add a new user login.

- 1 Click the **Tools** tab in the top menu pane.
- 2 Click **User Management**.



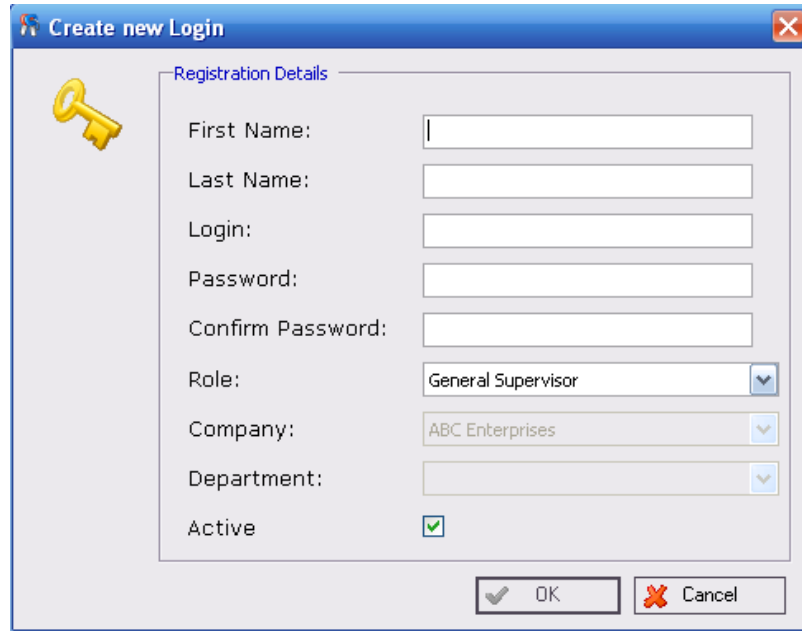
The following **PayPunch [User Management]** window displays. This example shows a General Supervisor and Company Supervisor.



Use the icons from the top left to **Add** , **Edit** , or **Delete**  a user.

- 3 Click Add .

The following **Create New Login** window displays.



The screenshot shows a 'Create new Login' dialog box with a yellow key icon on the left. The 'Registration Details' section contains the following fields:

Field	Value
First Name:	
Last Name:	
Login:	
Password:	
Confirm Password:	
Role:	General Supervisor
Company:	ABC Enterprises
Department:	
Active	<input checked="" type="checkbox"/>

At the bottom right are 'OK' and 'Cancel' buttons.

- 4 Complete the information.
- 5 From the pull-down menu, choose the **Role**.


Depending on the role you choose, the **Company** and **Department** may require a choice from the pull-down menus.

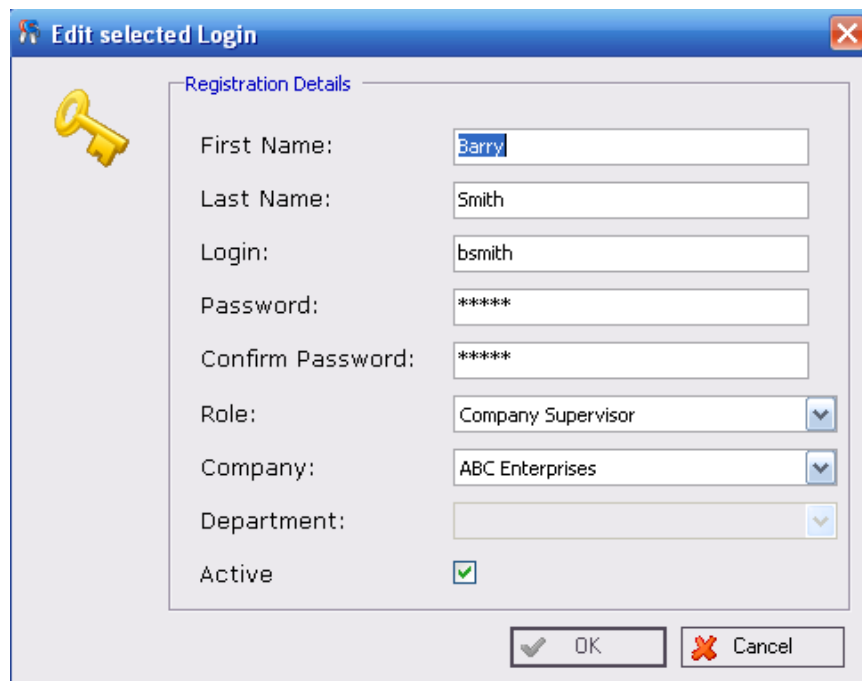
If a **Role** requires permission to a specific **Company** or **Department**, choose the appropriate permission for the role.

- 6 Click **OK** to add the role or **Cancel** to discard the entry.

Editing a User

Use this procedure to change role assignments or passwords.


- 1 Click the **Tools** tab in the top menu pane.
- 2 Click User Management.
The PayPunch [User Management] window displays.
- 3 Click Edit  .
The **Edit selected Login** window displays.

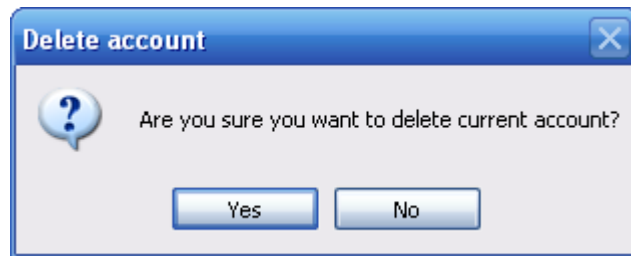


- 4 Make any necessary changes.
- 5 Click **OK** to save the changes or **Cancel** all changes.

Deleting a User

Use this procedure to delete role assignments or passwords.

- 1 Click the **Tools** tab in the top menu pane.
- 2 Click User Management.
The PayPunch [User Management] window displays.
- 3 Click **Delete** .
The **Delete account** window displays.



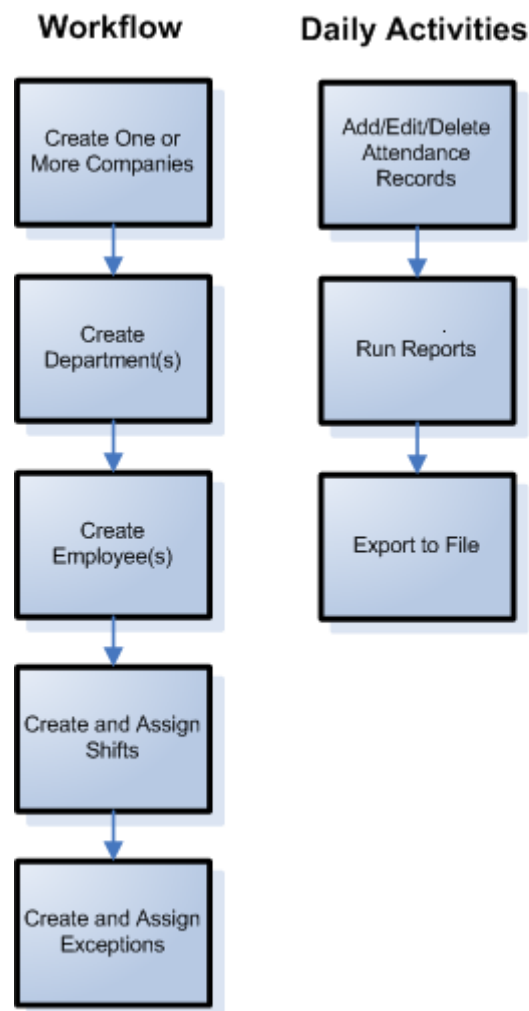
- 4 Click **Yes** to delete the user or **No** to keep the user name.

Chapter 4 Getting Started

This section provides a fast start to using the main features of PayPunch.

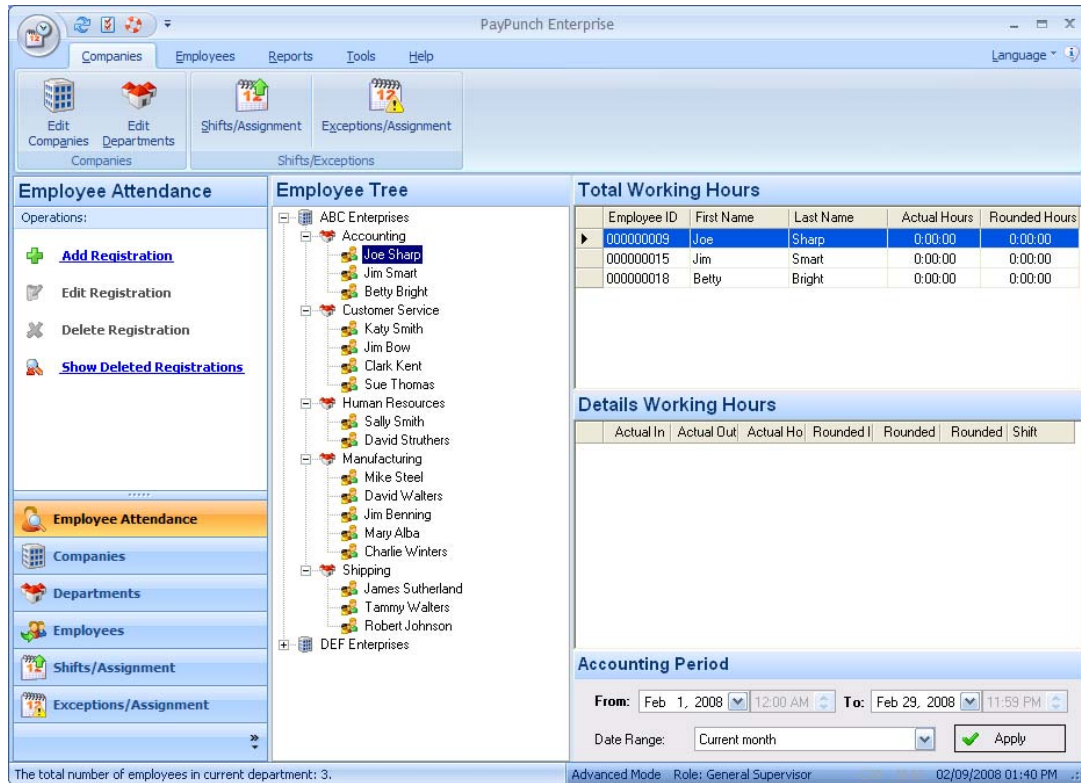
PayPunch Organization Set-Up Workflow and Daily Activities

The following illustrates the process to follow when you set up your PayPunch organizational structure; and the process flow of activities that could be performed on a daily basis.



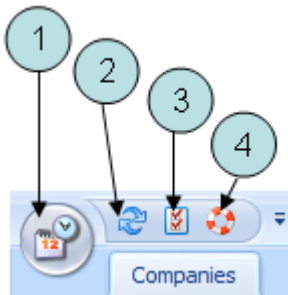
PayPunch Main Window

The PayPunch main window is divided into several sections. The window panes change according to the task you are performing.

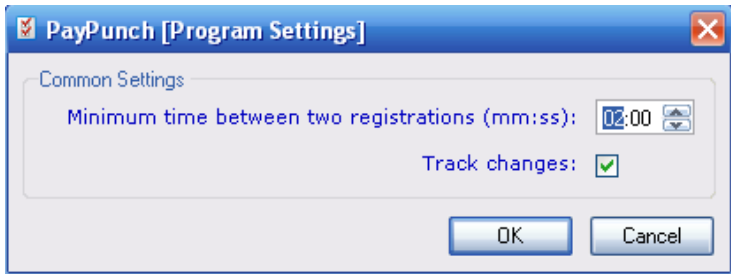


Top Menu

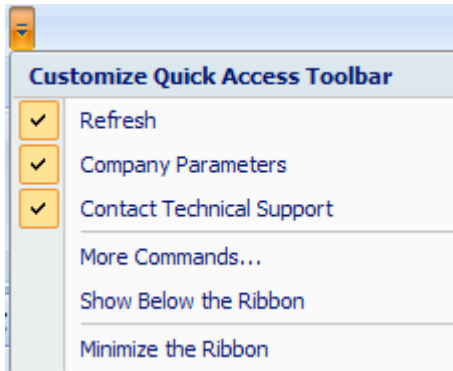
Whether you use the top menu or the **Left Menu** Pane to perform tasks in PayPunch is simply a matter of preference. Using either provides the same results.



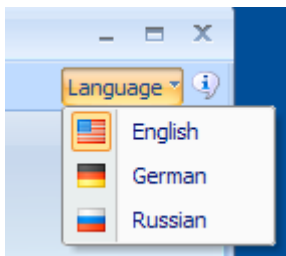
The following table describes each item from the left side of the top menu.

Item	Description
1	Click the PayPunch button to Refresh the window, Exit PayPunch; or perform an Add, Edit, or Delete of a selected company, employee, shift, or exception.
2	Click the Refresh button to refresh your window.
3	<p>Click this button to set the common Company Parameters from any window view. (For more information, see Chapter 5, “Managing Companies”).</p> <p>Note: The Track changes option is available only in the Professional and Enterprise Editions.</p> 
4	Click this button to contact technical support via email.

The following displays the pull-down menu located next to the technical support icon. Use these selections to customize your menu bar according to your preferences.



On the top right side of the menu, click the **Language** pull-down menu to select a language preference for viewing the PayPunch program. You can request a translation of the program into your local language by contacting **sales@paypunch.com**.



Click the Information icon to view information about your PayPunch software, such as the version, links to the web site, and an email link to technical support.

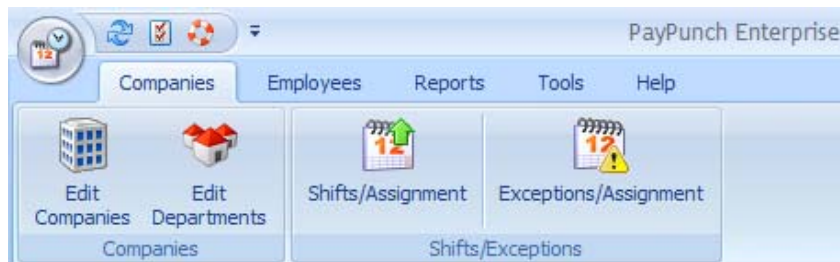


The following **About** window displays.



Companies Tab

Click the Companies tab to add, modify, or delete companies or departments; and assign shifts or exceptions to companies, departments, and employees.



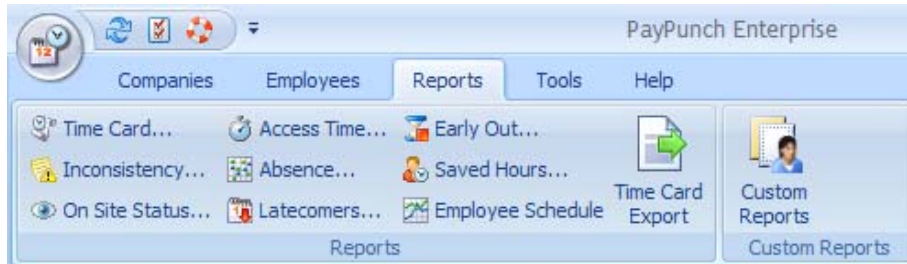
Employees Tab

Click the Employees tab to add, modify, or delete employees; assign shifts or exceptions to employees; and view employee attendance.



Reports Tab

For information on the Reports options, see Chapter 11, “**Generating Reports**” on page 11-1.

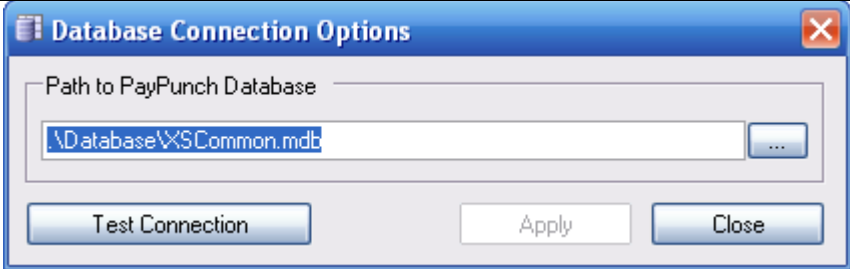
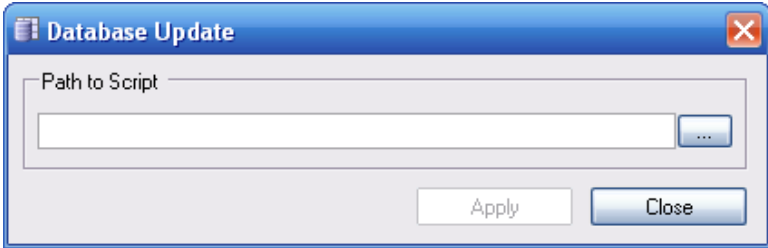
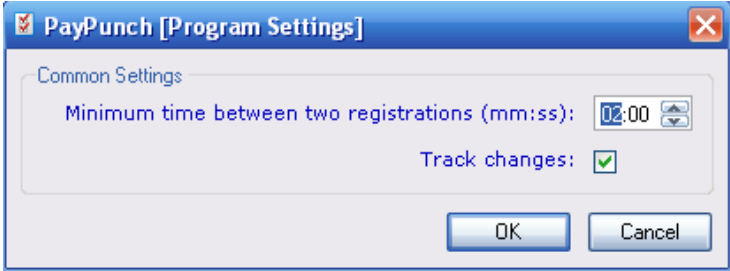


Tools Tab



The following table describes the **Tools** options.

Option	Description
User Management	See Chapter 3, “ User Management ” for detailed information.
Time Calculation	Advanced (Using Shifts) Simple (No Shifts/No Exceptions) Access Control (Controls who walks through the door).
Time Format	Select from Civilian (AM/PM) or Military (24 Hr).
Database	Displays the path to the database file and allows you to test the connection.

Option	Description
	
Database Update	<p>Path to the database script for upgrades. Do NOT use this option unless you are specifically instructed to do so by the Technical Support team.</p> 
Program Settings	<p>Click this button to set the Common Company Parameters. (For more information, see Chapter 5, “Managing Companies”.</p> <p>Note: The Track changes option is available only in the Professional and Enterprise Editions.</p> 

Help Tab

Click the **Help** tab for links to helpful information and registering your license key.

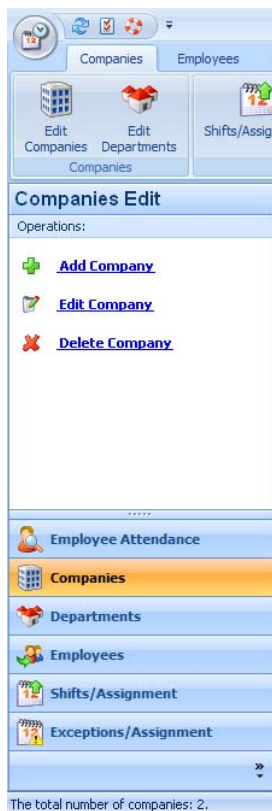
For more information on the **Install License Key** button, see “**Registering Your PayPunch Software**” on page 2-4.



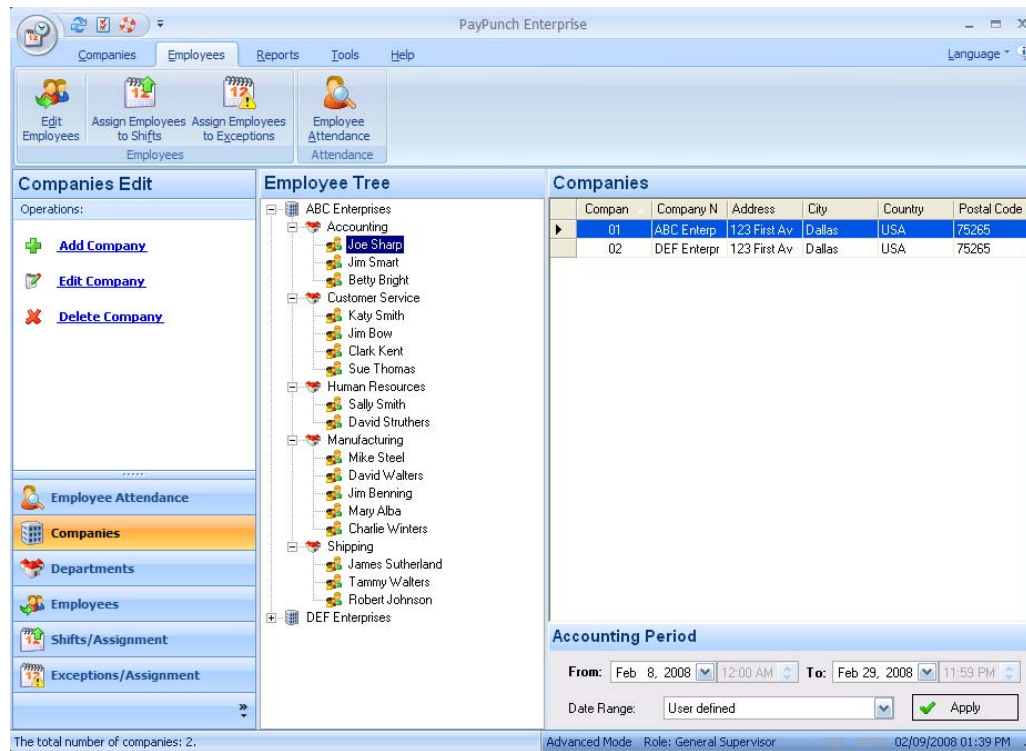
Left Menu Pane

The PayPunch left menu pane simply provides another alternative for selecting tasks versus clicking tabs from the top menu.

The following display shows that the **Companies** tab was selected from the top menu followed by clicking **Edit Companies**. The choices to add, edit, or delete a company display in the Operations pane and the **Companies** tab gets highlighted in the lower pane.

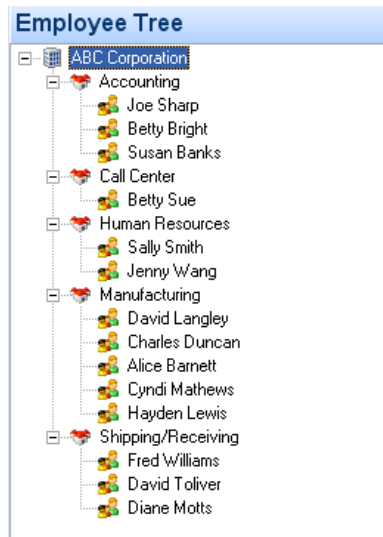


However, the reverse is not true. For example, you clicked the **Employees** tab in the top menu to make changes. Then you decide to edit your companies by clicking the **Companies** tab in the lower left pane. The Employees tab information remains displayed in the top menu even though you are working in the **Companies Edit** window, which is ok.

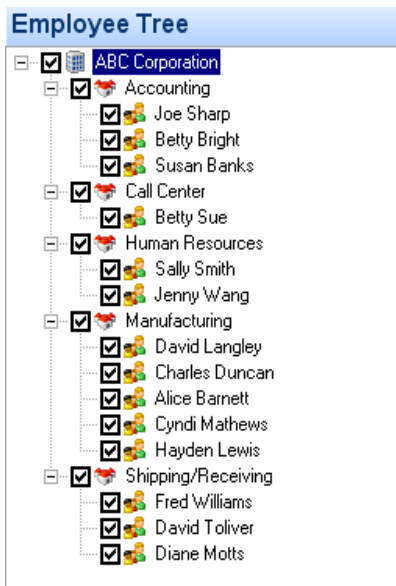


Employee Tree

The center pane of the PayPunch main window is the **Employee Tree**, which displays the companies, departments, and employees.



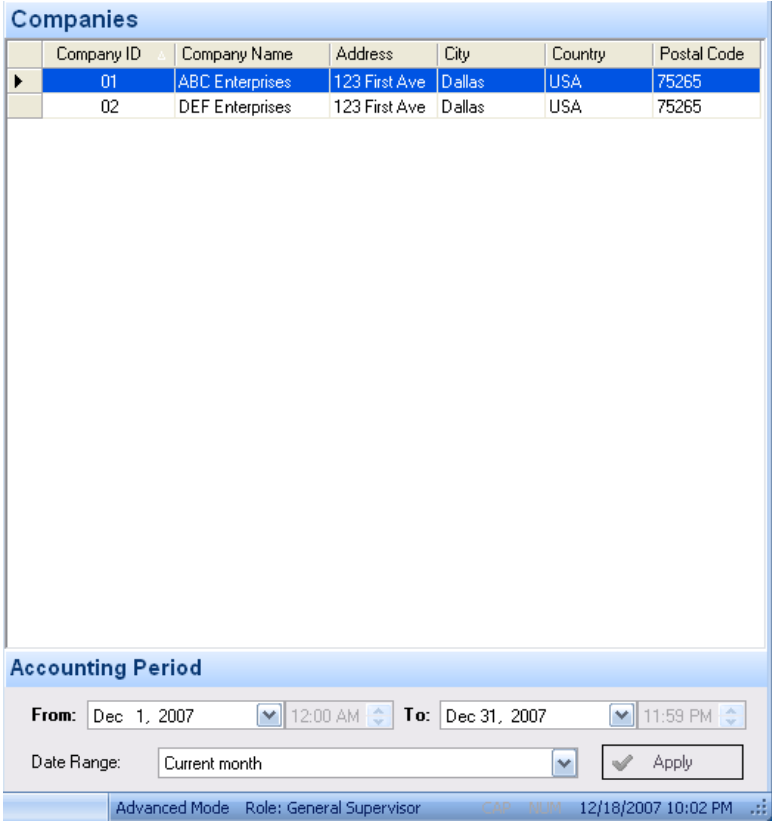
The **Employee Tree** display remains the same except when you are assigning shifts and exceptions; at which point check boxes appear next to the companies, departments, and employees.



Right Pane

The right-side menu pane displays information relevant to the task you are performing; such as working hours, departments, employees, shifts, and exceptions.

The following display shows an example of the right-side pane when you are working with **Companies**.



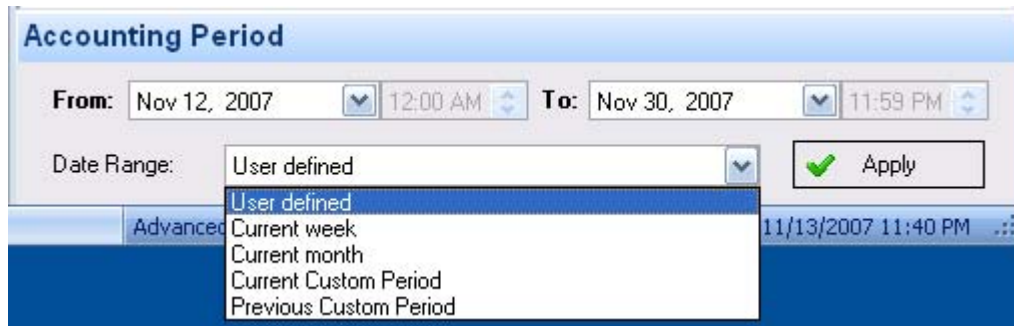
Companies						
	Company ID	Company Name	Address	City	Country	Postal Code
▶	01	ABC Enterprises	123 First Ave	Dallas	USA	75265
	02	DEF Enterprises	123 First Ave	Dallas	USA	75265

Accounting Period	
From:	Dec 1, 2007 12:00 AM To: Dec 31, 2007 11:59 PM
Date Range:	Current month Apply

Advanced Mode Role: General Supervisor C:\P\... 12/18/2007 10:02 PM

Accounting Period Pane (*Professional and Enterprise Editions Only*)

The **Accounting Period** pane is located in the lower section of the right-side menu pane.



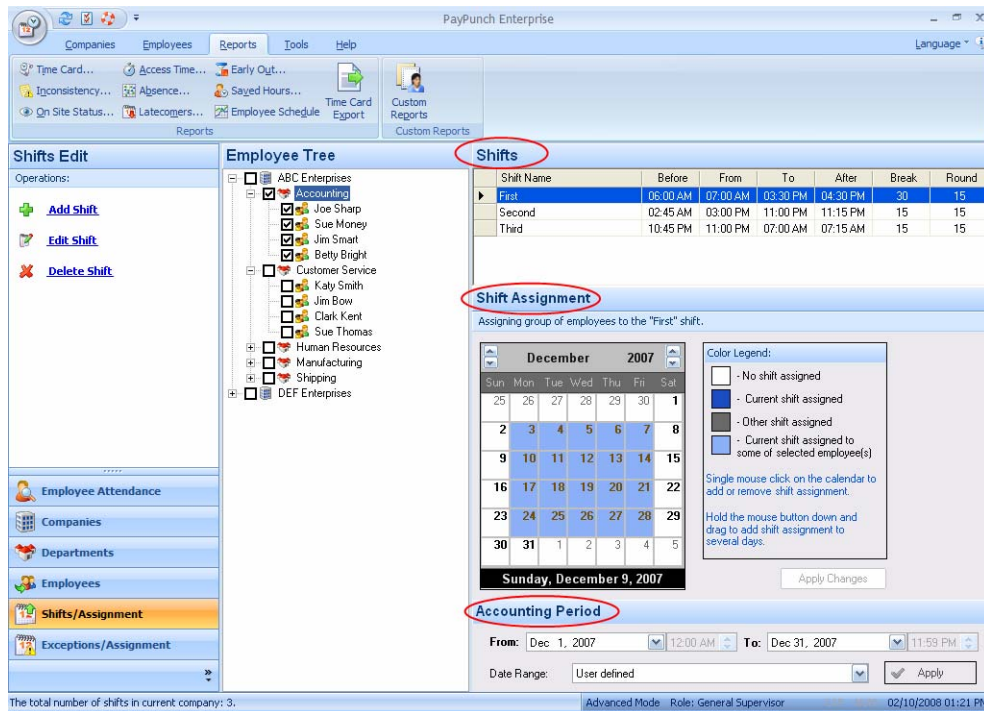
The following table describes the **Date Range** selections listed in the pull-down menu.

Date Range Selection	Description
User defined	Select a range of dates to set or retrieve information in the From and To fields.
Current week (Professional and Enterprise Editions Only)	Automatically completes the date fields for the current week.
Current month (Professional and Enterprise Editions Only)	Automatically completes the date fields for the current month.
Current Custom Period (Enterprise Edition Only)	Automatically completes the date for the current custom period.
Previous Custom Period (Enterprise Edition Only)	Automatically completes the date for the previous custom period.

Additional Information in the Right-Side Pane

The following displays how the right-side pane gets divided into the following three sections when you are working with shift assignments and exceptions:

- Shifts
- Shift Assignment
- Accounting Period



Instructions on how to use these sections are in the Chapter 8, “**Managing Shifts**” on page 8-1.

Creating Your Organization Structure

The following sections detail how to set up your PayPunch software to reflect your organization structure.

- [Companies](#)
- [Departments](#)
- [Employees](#)
- [Shifts/Assignments](#) (Professional and Enterprise Editions Only)
- [Exceptions/Assignments](#) (Enterprise Edition Only)
- [Registering Employee Attendance](#)

Chapter 5 Managing Companies

This section details the following tasks for managing companies:

- [Add Companies](#)
- [Edit Companies](#)
- [Delete Companies](#)

Adding Companies

PayPunch supports one or more number of companies. Each company can have their own set of shifts, exceptions, and overtime settings.

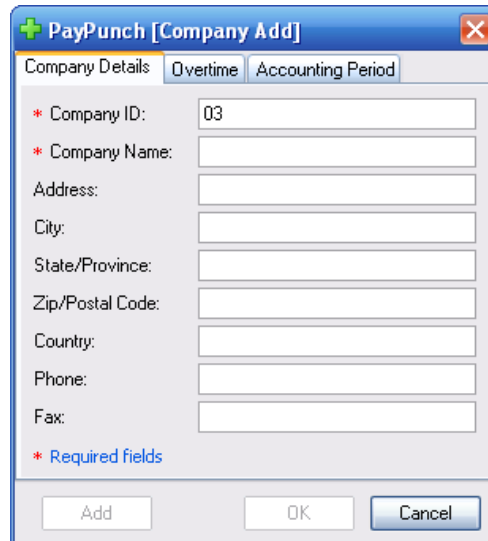
To Add a Company:

- 1 Click **Companies** from the lower left menu, or from the top menu, click **Companies > Edit Companies**.



- 2 From the left menu, click **Add Company**.

The following **PayPunch [Company Add]** window displays in the **Company Details** tab, along with the **Overtime** tab and **Accounting Period** tab.

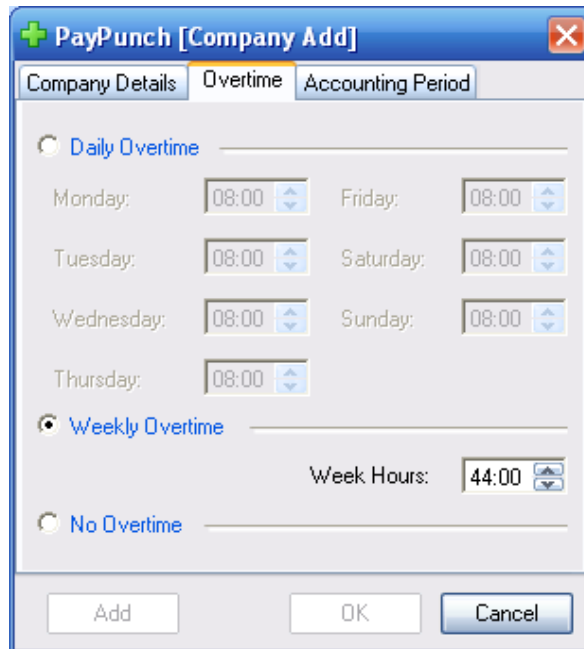


Company Details

- 3 Complete the **Company Details** fields.
- 4 Click the [Overtime](#) tab and the [Accounting Period](#) tab (*Enterprise Edition only*) to set those parameters.
- 5 Click **Add** to add the company and continue adding more companies or click **OK** to add the company and end the **Company Add** session. Click **Cancel** to close the window and discard any current entry.

Note: If you clicked **Add** and added several companies, then clicked **Cancel**, only the current entry gets canceled. The entries prior to canceling do not get discarded and are added to the **Employee Tree** window pane and **Companies** pane.

Overtime Tab (*PayPunch Enterprise Edition Only*)

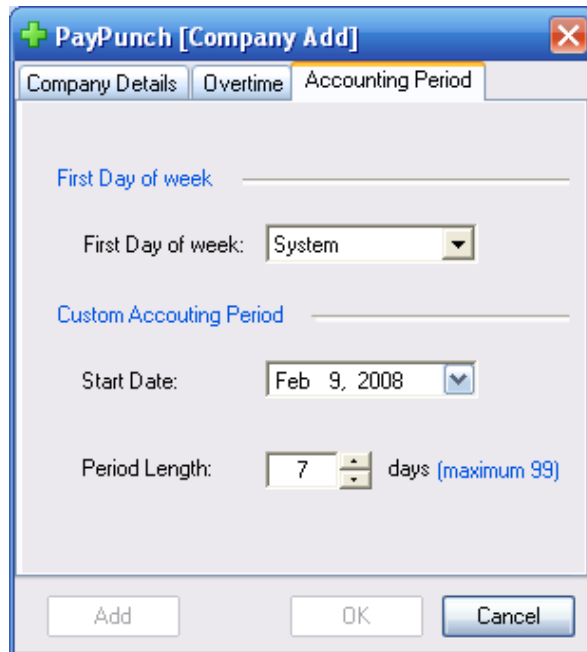


- 6 Set the overtime for each company. Click the **Overtime** tab to specify Weekly or Daily overtime hours per company; or No Overtime.
- 7 Click the [Accounting Period](#) tab (*Enterprise Edition only*) to set those parameters or go to **Step 8**.
- 8 Click **Add** to add the company and continue adding more companies or click **OK** to add the company and end the **Company Add** session. Click **Cancel** to close the window and discard any current entry.
Note: If you clicked **Add** and added several companies, then clicked **Cancel**, only the current entry gets canceled. The entries prior to canceling do not get discarded and are added to the **Employee Tree** window pane and **Companies** pane.

Accounting Period Tab (*PayPunch Enterprise Edition Only*)

Using the **Accounting Period** tab, you can select the first day of the week when you want your pay period to begin or choose the System settings, as shown in the following illustration.

You can also set a **Custom Accounting Period** to specify when your Accounting Period begins and designate the number of days for that period. For more information, see the section on the “**Accounting Period Pane**”.



The image shows a Windows-style dialog box titled "PayPunch [Company Add]". It has three tabs: "Company Details", "Overtime", and "Accounting Period", with "Accounting Period" currently selected. The dialog contains the following fields and controls:

- First Day of week:** A text label followed by a dropdown menu showing "System".
- Custom Accounting Period:** A text label followed by a dropdown menu.
- Start Date:** A text label followed by a date picker showing "Feb 9, 2008".
- Period Length:** A text label followed by a spinner box showing "7", the text "days", and a blue link "(maximum 99)".

At the bottom of the dialog are three buttons: "Add", "OK", and "Cancel".

Click **Add** to add the company and continue adding more companies or click **OK** to add the company and end the **Company Add** session. Click **Cancel** to close the window and discard any current entry.

Note: If you clicked **Add** and added several companies, then clicked **Cancel**, only the current entry gets canceled. The entries prior to canceling do not get discarded and are added to the **Employee Tree** window pane and **Companies** pane.

Using Program Settings to Set Common Company Parameters

Use the Program Settings button to set common parameters for all companies and departments.

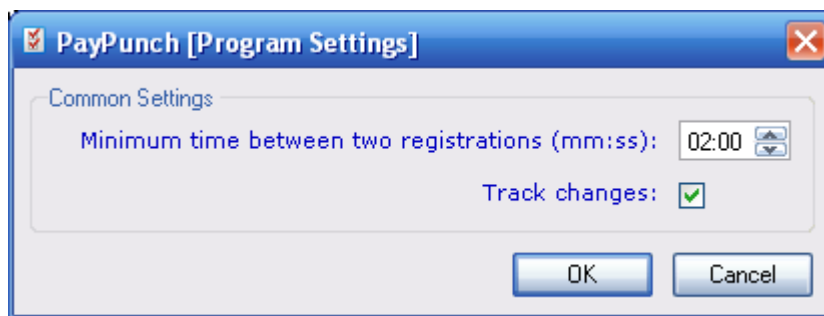
- 1 Click the Program Settings button from the top left menu as shown in the following display:



Or click **Tools > Program Settings** from the top menu as shown in the following display:



The PayPunch [Program Settings] window displays.



- 2 Complete the common registration settings and click the **Track changes** box to retain a history of changes to punch registrations.

Note: The **Track changes** option is available only in the Professional and Enterprise Editions.

- 3 Click **OK** to set the common company parameters. Click **Cancel** to close the window and discard any current entry.

Editing Companies

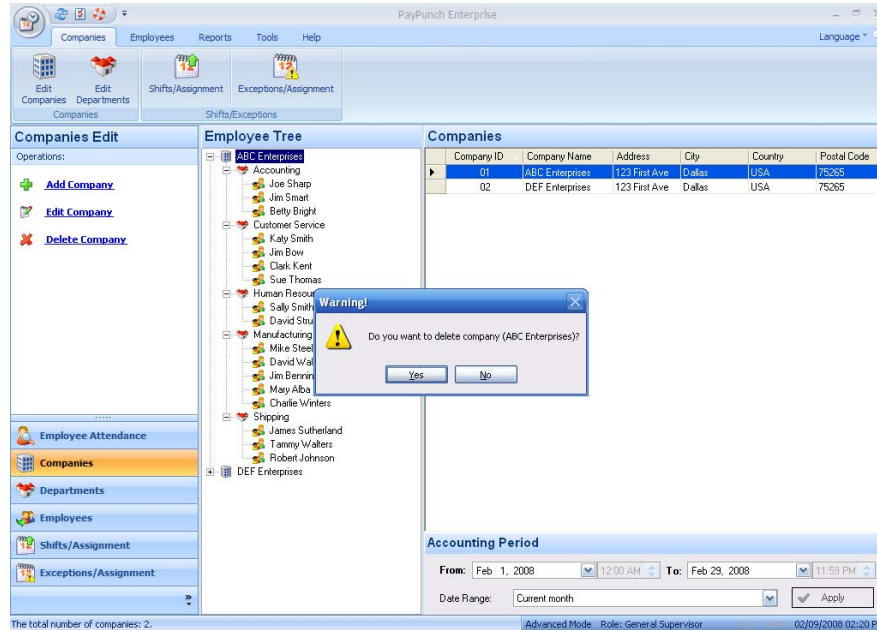
- 1 Click **Companies** from the lower left menu, or from the top menu, click **Companies > Edit Companies**.
- 2 Click on the company name to select the company to edit.
- 3 Click **Edit Company** from the left menu.
The **PayPunch [Company Edit]** window displays.
- 4 Make the necessary changes in the **Company Details** fields and click **OK**.

The company you edited appears in the center **Employee Tree** pane and in the Companies pane and includes the changes you made.

Deleting Companies

- 1 Click **Companies** from the lower left menu, or from the top menu, click **Companies > Edit Companies**.
- 2 To select a company to delete, click on the company name from the **Employee Tree** or in the **Companies** pane.
- 3 Click **Companies** from the lower left menu, or from the top menu, click **Companies > Edit Companies**.

- 4 Click **Delete Company** from the left Companies Edit menu. The following warning window displays:



- 5 Click **Yes**.
- 6 The deleted company no longer appears in the center **Employee Tree** pane or in the **Companies** pane.

If you attempt to delete a company that has employees, the following sample warning window displays:



- 7 Click **Yes** to delete the company, its employees, and attendance records or continue to **Step 8**.

Note: Once you delete employees and attendance records, they are removed from the database and cannot be retrieved.

- 8 Click **No** to keep the company and its employees.

Chapter 6 Managing Departments

This section details the following tasks for managing departments:

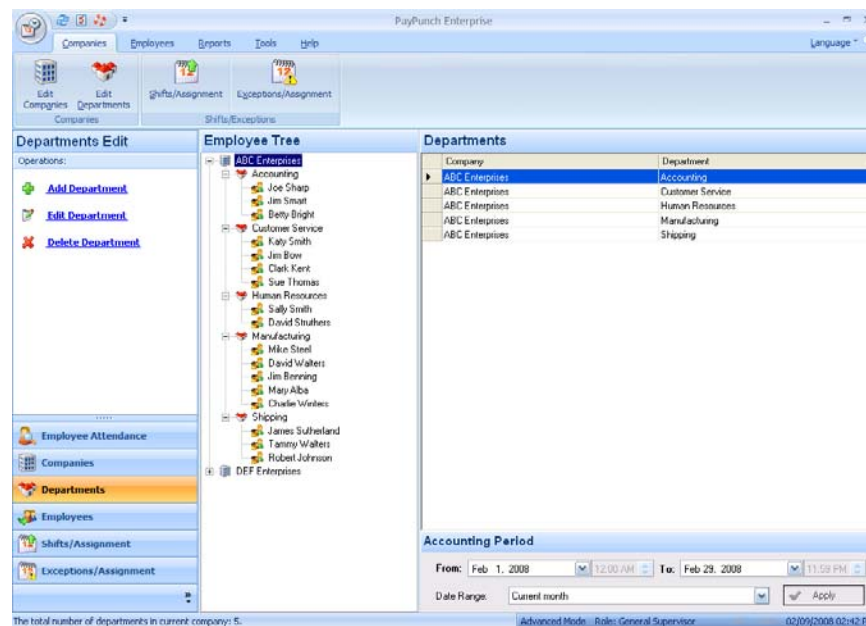
- [Add Departments](#)
- [Edit Departments](#)
- [Delete Departments](#)

Adding Departments

Use the following procedure to add departments for each company that you created in Chapter 5, “**Managing Companies**”.

To Add a Department:

- 1 Click **Departments** from the lower left menu pane as shown in the following display.



- 2 Click **Add Department** from the left menu.
- 3 In the **Department Name** field, type a department name.
- 4 Click **Add** to add the department and continue adding more departments or click **OK** to save the changes and end the **Department Add** session. Click **Cancel** to close the window without saving any of the information.

The added department displays in the **Employee Tree** and **Departments** pane.

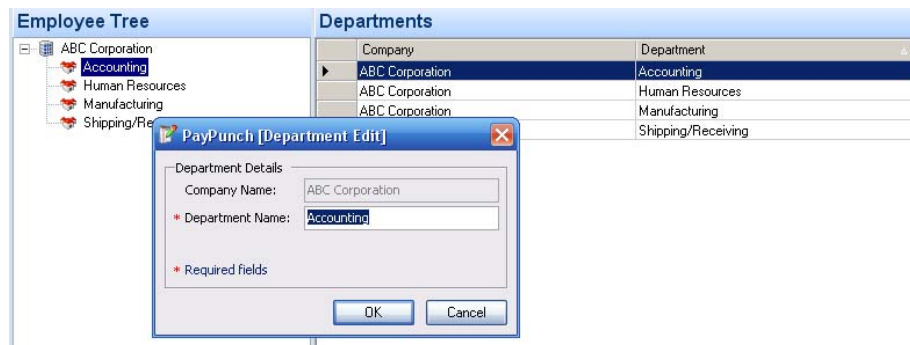
Note: If you clicked **Add** and added several departments, then clicked **Cancel**, only the current entry gets canceled. The entries prior to canceling do not get discarded and are added to the **Employee Tree** window pane and **Departments** pane.

Editing Departments

Use the following procedure to edit department names.

To Edit a Department:

- 1 Click **Departments** from the lower left menu.
- 2 Click **Edit Department** from the left menu.
The **PayPunch [Department Edit]** window displays.



- 3 In the **Department Name** field, change the department name by typing the new department name over the previous name.

- 4 Click **OK**.
- 5 The corrected department name displays in the **Employee Tree** and **Departments** pane.
- 6 To edit additional departments, repeat Steps 2–4.

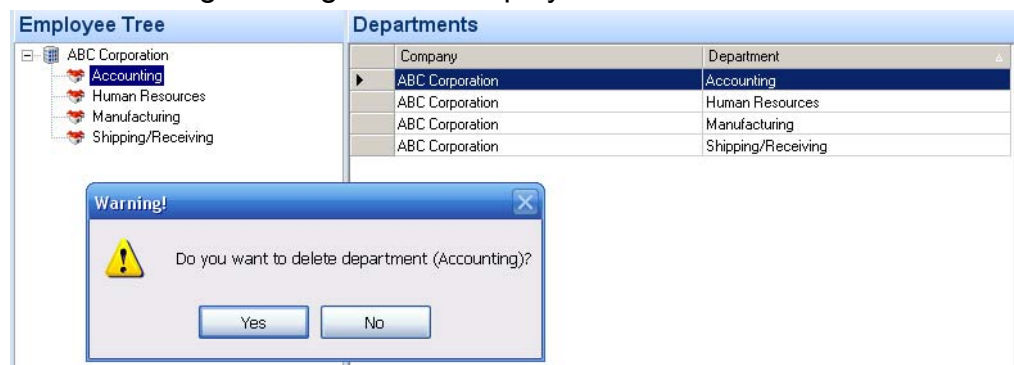
Deleting Departments

Use the following procedure to delete department names.

To Delete a Department:

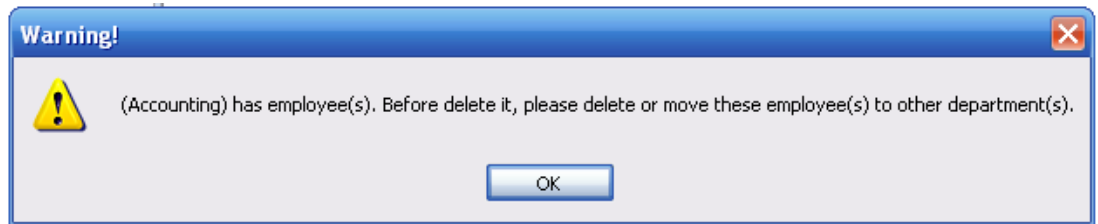
- 1 Click **Departments** from the lower left menu.
- 2 To select a department to delete, click on the department name from the **Employee Tree** or in the **Departments** pane.
- 3 Click **Delete Department** from the left menu.

The following warning window displays.



- 4 Click **Yes**.
The deleted department name no longer displays in the **Employee Tree** and **Departments** pane.

- 5 If you attempt to delete a department that has employees, the following warning window displays and you must do one of the following:
- a) Move the employee(s) to another department or
 - b) Delete the employee(s) before you delete the department.
 - c) Click the red **X** box in the upper right corner to keep the department.
 - d) Click **OK** to delete the department and all of its employees.



- 6 When all employees for that department have been moved or deleted, delete the department by repeating **Steps 2–4**.
- 7 To delete additional departments, repeat **Steps 2–4**.

Chapter 7 Managing Employees

This section details the following tasks for managing employees:

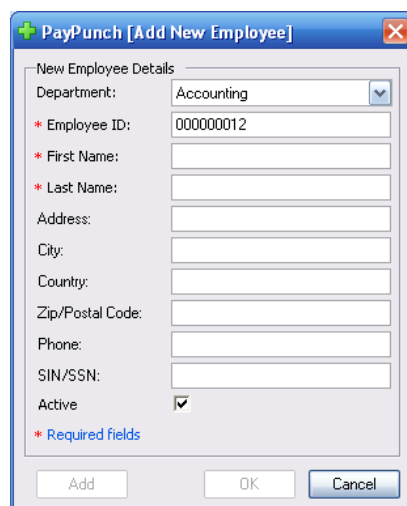
- [Add Employees](#)
- [Edit Employees](#)
- [Delete Employees](#)
- [Employee Attendance](#)

Adding Employees

Use the following procedure to add employees for each department that you created in Chapter 6, “**Managing Departments**”.

To Add an Employee:

- 1 Click **Employees** from the lower left menu or click **Employees > Edit Employees** from the top menu.
- 2 Click the company or department name to which you want to add the employee.
- 3 Click **Add Employee** from the left menu.
The following **PayPunch [Add New Employee]** window displays.

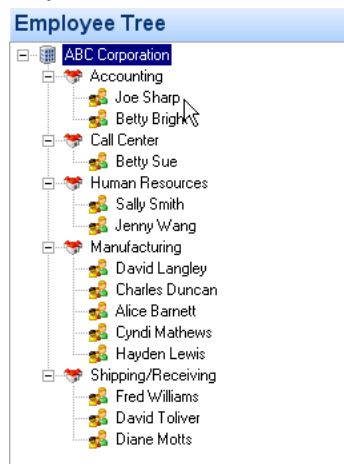


In the example, Joe Sharp is getting added to the Accounting department.

Note: Make sure the Employee ID matches the ID on any time device you use.

When adding a new employee, the **Active** check box is checked by default to indicate that there is an available PayPunch license for the employee.

- 4 Click **Add** to add the employee to the department and continue adding more employees to that department or click **OK** to save the changes and end the **Employee Add** session. Click **Cancel** to close the window without saving any of the information.
- 5 Joe's name now displays in the **Employee Tree** in the Accounting department.

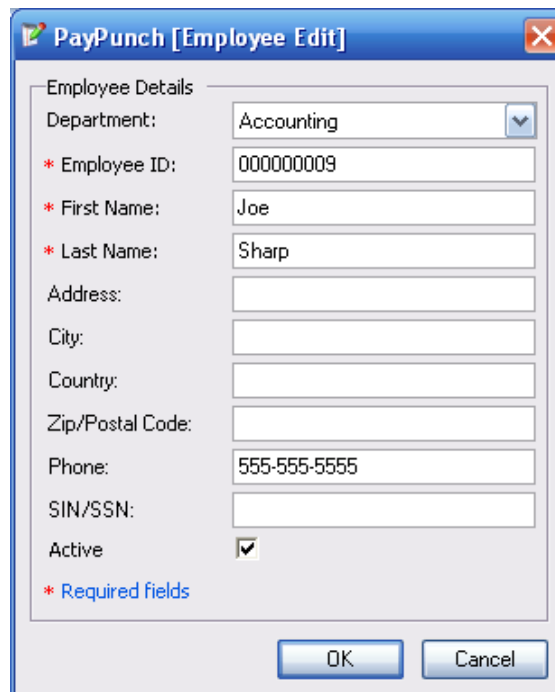


Editing Employees

Use the following procedure to edit employee information, such as address or phone number.

To Edit an Employee:

- 1 Click **Employees** from the lower left menu or click **Employees > Edit Employees** from the top menu.
- 2 To select an employee and edit their information, click the employee name.
- 3 Click **Edit Employee** from the left menu.
The following **PayPunch [Employee Edit]** window displays.

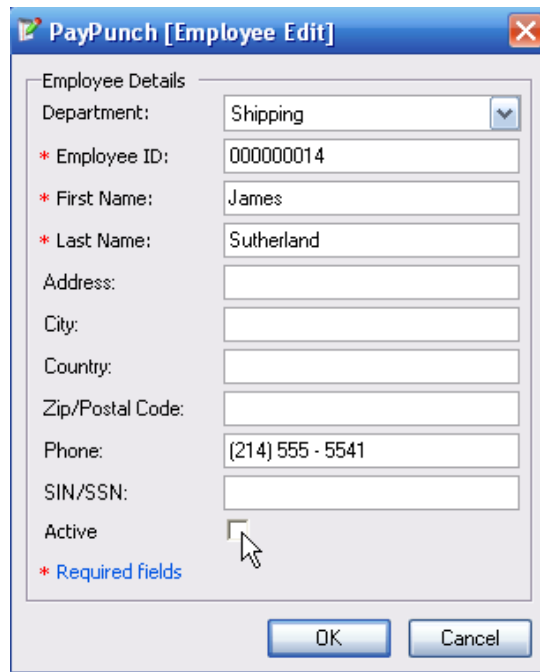


In the displayed example, Joe's phone number was added because it was not included when he got added in the **Add New Employee** window.

- 4 Click **OK** save the changes in the employee's details, or click **Cancel** to close the window without saving any changes.

Placing an Employee on Inactive Status

- 1 Click the employee name of the employee that will not be currently working.
- 2 Click Edit Employee.
- 3 Click the **Active** check box to remove the check mark.



PayPunch [Employee Edit]

Employee Details

Department: Shipping

* Employee ID: 000000014

* First Name: James

* Last Name: Sutherland

Address:

City:

Country:

Zip/Postal Code:

Phone: (214) 555 - 5541

SIN/SSN:

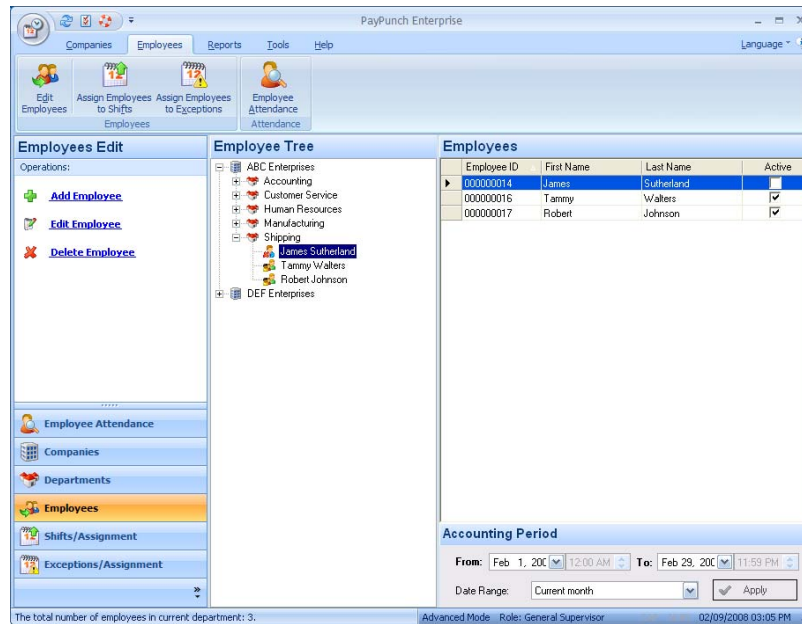
Active ☒

* Required fields

OK Cancel

- 4 Click **OK** to save the changes and retain his information in an inactive state or click **Cancel** to exit the window without saving the changes.

Example: The following shows Jim Sutherland now appears in the **Employee Tree** Shipping department and in the **Employees** pane as an inactive employee. His PayPunch license is now available for use for a new employee.

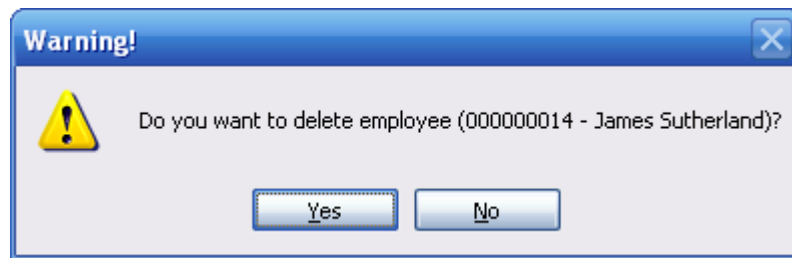


Deleting Employees

Use the following procedure to delete employees and retain their PayPunch license for a new-hire employee to avoid buying additional licenses.

To Delete an Employee:

- 1 Click **Employees** from the lower left menu or click **Employees > Edit Employees** from the top menu.
- 2 To select an employee for deletion, click the employee name.
- 3 Click **Delete Employee** from the left menu.
The following warning window displays.



- 4 Click **Yes**.

The employee no longer appears in the **Employee Tree** or **Employees** window panes, but the license for Employee ID: **000000015** remains available for the next employee you add so you don't have to purchase another PayPunch license.

Sorting the Employees List

You can sort the Employees list by clicking the headers in the **Employees** pane. Your choice will reflect the same sorting order for each department and company.

Sort by Employee ID

Click **Employee ID** as shown. The employees display by ID in numerical order.

Employees				
	Employee ID	First Name	Last Name	Active
▶	000000001	Bill	Davidson	<input checked="" type="checkbox"/>
	000000002	Barbara	Edmondson	<input checked="" type="checkbox"/>
	000000003	John	Chandler	<input checked="" type="checkbox"/>
	000000004	Donald	Robertson	<input checked="" type="checkbox"/>
	000000005	Ellen	James	<input checked="" type="checkbox"/>
	000000006	Kenneth	Norman	<input checked="" type="checkbox"/>
	000000008	Susan	Zhare	<input checked="" type="checkbox"/>

Sort by Last Name

Click **Last Name** as shown. The employees display by alphabetical order of their last names.

Employees				
	Employee ID	First Name	Last Name	Active
▶	000000003	John	Chandler	<input checked="" type="checkbox"/>
	000000001	Bill	Davidson	<input checked="" type="checkbox"/>
	000000002	Barbara	Edmondson	<input checked="" type="checkbox"/>
	000000005	Ellen	James	<input checked="" type="checkbox"/>
	000000006	Kenneth	Norman	<input checked="" type="checkbox"/>
	000000004	Donald	Robertson	<input checked="" type="checkbox"/>
	000000008	Susan	Zhare	<input checked="" type="checkbox"/>

Sort by First Name

Click **First Name** as shown. The employees display by alphabetical order of their first names.

Employees				
	Employee ID	First Name	Last Name	Active
▶	000000002	Barbara	Edmondson	<input checked="" type="checkbox"/>
	000000001	Bill	Davidson	<input checked="" type="checkbox"/>
	000000004	Donald	Robertson	<input checked="" type="checkbox"/>
	000000005	Ellen	James	<input checked="" type="checkbox"/>
	000000003	John	Chandler	<input checked="" type="checkbox"/>
	000000006	Kenneth	Norman	<input checked="" type="checkbox"/>
	000000008	Susan	Zhare	<input checked="" type="checkbox"/>

Sort by Active or Inactive Status

Click **Active** as shown. You can view all inactive employees first in the list, or click **Active** again to view all active employees first.

	Employee ID	First Name	Last Name	Active
▶	000000019	Sandra	Billing	<input type="checkbox"/>
	000000001	Katy	Smith	<input checked="" type="checkbox"/>
	000000002	Jim	Bow	<input checked="" type="checkbox"/>
	000000003	Clark	Kent	<input checked="" type="checkbox"/>
	000000004	Sue	Thomas	<input checked="" type="checkbox"/>
	000000005	Sally	Smith	<input checked="" type="checkbox"/>
	000000006	David	Struthers	<input checked="" type="checkbox"/>
	000000007	Mike	Steel	<input checked="" type="checkbox"/>
	000000008	David	Walters	<input checked="" type="checkbox"/>
	000000009	Joe	Sharp	<input checked="" type="checkbox"/>
	000000010	Jim	Benning	<input checked="" type="checkbox"/>
	000000011	Mary	Alba	<input checked="" type="checkbox"/>
	000000013	Charlie	Winters	<input checked="" type="checkbox"/>
	000000014	James	Sutherland	<input checked="" type="checkbox"/>
	000000015	Jim	Smart	<input checked="" type="checkbox"/>
	000000016	Tammy	Walters	<input checked="" type="checkbox"/>
	000000017	Robert	Johnson	<input checked="" type="checkbox"/>
	000000018	Betty	Bright	<input checked="" type="checkbox"/>

Chapter 8 Managing Shifts (*Professional and Enterprise Editions Only*)

This sections details the following tasks for managing shifts:

- [Create Shifts/Assignments](#)
 - [Rounding Details](#)
 - [Rounding Rules](#)
 - [Block Rounding Rules](#)
- [Edit Shifts/Assignments](#)
- [Delete Shifts/Assignments](#)

Creating Shifts and Rounding Details

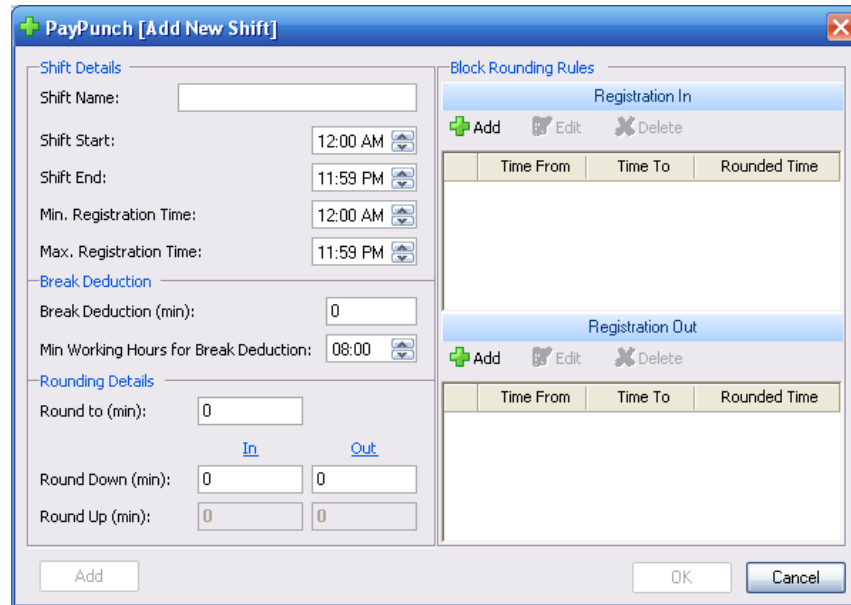
After you have created your organizational structure in PayPunch, including Companies, Departments, and Employees, you will need to create shifts. Each company or department can have their own set of shifts.

Shifts can be assigned to the following: Employee(s), Department(s), or an entire Company.

To Add a Shift:

- 1 Click **Shifts/Assignment** from the lower left menu.
- 2 Click **Add Shift**.

- 3 The **PayPunch [Add New Shift]** window displays.



PayPunch [Add New Shift]

Shift Details

Shift Name:

Shift Start: 12:00 AM

Shift End: 11:59 PM

Min. Registration Time: 12:00 AM

Max. Registration Time: 11:59 PM

Break Deduction

Break Deduction (min): 0

Min Working Hours for Break Deduction: 08:00

Rounding Details

Round to (min): 0

[In](#) [Out](#)

Round Down (min): 0 0

Round Up (min): 0 0

Block Rounding Rules

Registration In

[Add](#) [Edit](#) [Delete](#)

Time From	Time To	Rounded Time

Registration Out

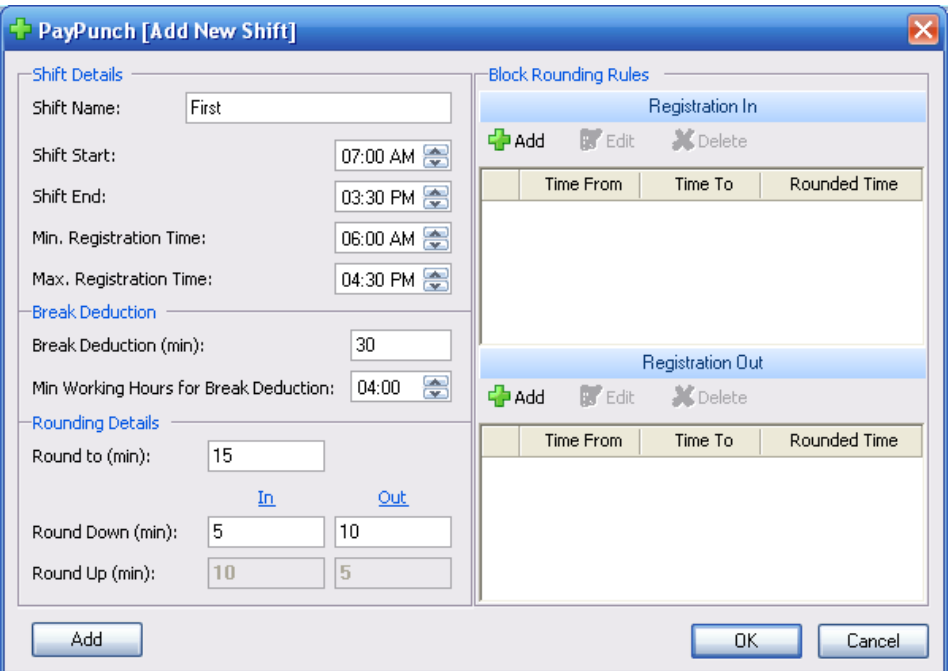
[Add](#) [Edit](#) [Delete](#)

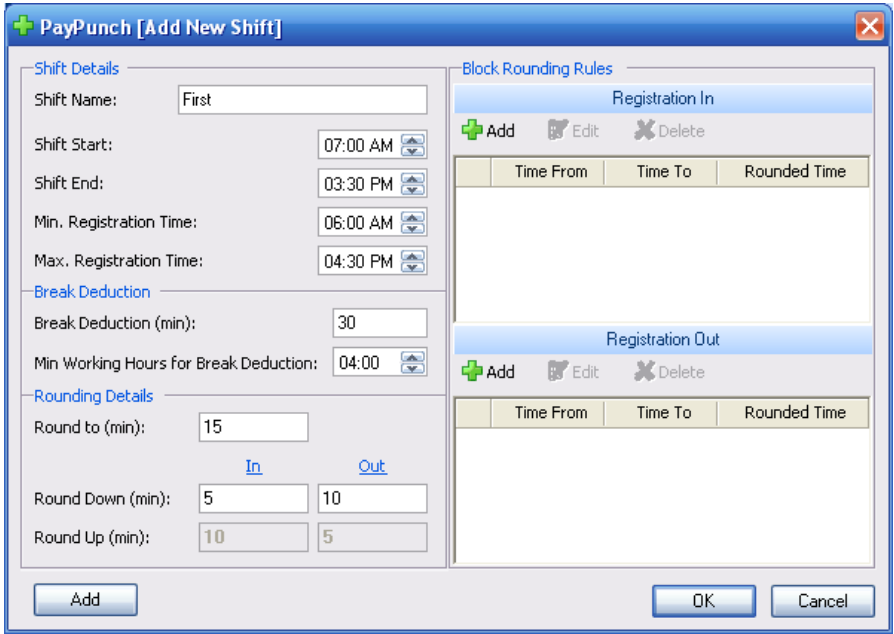
Time From	Time To	Rounded Time

[Add](#) [OK](#) [Cancel](#)

- 4 Type a **Shift Name**, such as First, Second, Day, Night, and so on.
Note: You will need to add different shifts separately.

Complete the remaining fields according to the following table.

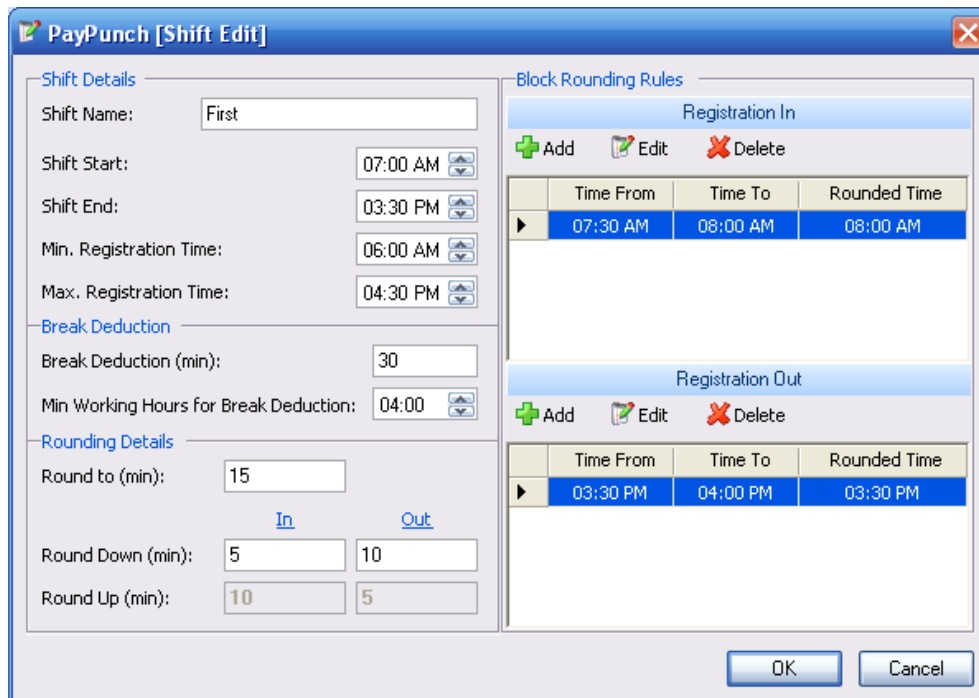
Field Name	Description
Shift Details 	
Shift Start	The time when the work shift begins.
Shift End	The time when the work shift ends.
Min. Registration Time	The earliest an employee can punch in before a shift begins. For example, a shift begins at 7 AM, but the employee can punch in at 6:45 AM since the example defines a 6:00 AM minimum registration time.
Max. Registration Time	The latest an employee can punch out after the shift ends. For example, a shift ends at 3:30 PM, but the employee was asked to work for an extra 30 minutes. The employee can punch out at 4 PM since the example defines a maximum registration time of 4:30 PM.

Break Deduction	
Break Deduction (min)	This is the time that is automatically deducted from the total daily working hours. For example, if we put 30 in this field, then 30 minutes will be automatically deducted every shift from the total worked hours without employees having to punch out for their break. If you want employees to punch out for their break, then put 0 in this field.
Min Working Hours for Break Deduction	This is the number of hours an employee must work before the break is automatically deducted. For example, after an employee works 4 hours (04:00 entered in this field), a 30 minute break [30 would be entered in the Break Deduction (min) field] will be automatically deducted from the employee's total daily work hours.
Rounding Details	
	
Round to (min)	When records come through a time clock device, they can be rounded. For example, put 15 in this field. This means that all times are going to be rounded to the nearest quarter of an hour: 15, 30, 45 and 00.
Round Down (min)	Sets the rule on how to round the time. For example, if we put 5 in this field, then the first 5 minutes will get rounded down and the remaining times will get rounded up.

Break Deduction

	In PayPunch Enterprise, you can set different rules for punching in and out.
Round Up (min)	This field gets automatically populated based on the Round to and Round Down values.

Block Rounding Rules (*PayPunch Enterprise Edition Only*)



The screenshot shows the 'PayPunch [Shift Edit]' window. The left pane contains 'Shift Details' (Shift Name: First, Shift Start: 07:00 AM, Shift End: 03:30 PM, Min. Registration Time: 06:00 AM, Max. Registration Time: 04:30 PM), 'Break Deduction' (Break Deduction (min): 30, Min Working Hours for Break Deduction: 04:00), and 'Rounding Details' (Round to (min): 15, Round Down (min): 5, Round Up (min): 10). The right pane, titled 'Block Rounding Rules', has two sections: 'Registration In' and 'Registration Out'. Each section has 'Add', 'Edit', and 'Delete' buttons and a table with columns 'Time From', 'Time To', and 'Rounded Time'. The 'Registration In' table has one rule: Time From 07:30 AM, Time To 08:00 AM, Rounded Time 08:00 AM. The 'Registration Out' table has one rule: Time From 03:30 PM, Time To 04:00 PM, Rounded Time 03:30 PM. At the bottom are 'OK' and 'Cancel' buttons.

Registration In	The Block Rounding Rules in the right pane allows you to set specific times and overrides any settings in the Rounding Details . This rule applies only when the record comes through the time clock. For example, you can add a rule to Registration In so that if an employee punches in between 6:00am and 7:00am, then the time will be rounded to 7:00am.
Registration Out	

- Click **Apply** to create the shift and rounding rules and add another shift or click **OK** to end the Add New Shift session. Click **Cancel** to close the window without saving the information.

Editing Shifts

- 1 Click **Shifts/Assignment** from the lower left menu.
- 2 Click **Edit Shift**.
The **PayPunch [Shift Edit]** window displays.
- 3 Make changes to any of the fields.
Note: If you change any rounding rules, they only take effect from that point forward so that previous payroll records are not affected.
- 4 Click **OK** to save the changes to the shift and/or rounding rules; or **Cancel** to close the window without saving the information.

Deleting Shifts

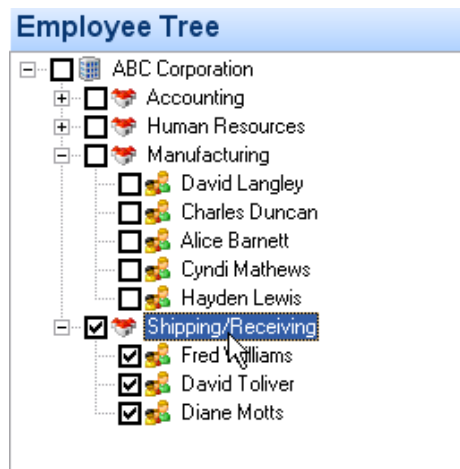
- 1 Click **Shifts/Assignment** from the lower left menu.
- 2 Click the *Shift Name* in the **Shifts** pane located on the right.
- 3 Click **Delete Shift**.
A warning window displays asking if you want to delete the selected shift.
- 4 Click **Yes** to delete the shift; or **No** to close the window and keep the shift.

Assigning Shifts

PayPunch allow you to assign shifts to many employees, an entire department, or an entire company.

To Assign Shifts:

- 1 Click **Shifts/Assignment** from the lower left menu or **Employees > Assign Employees to Shifts**.
- 2 Click the *Shift Name* in the Shifts pane located on the right.
- 3 Click the check box of each Company, Department, or Employee to apply the selected shift.



- 4 In the **Shift Assignment** pane, click a day to apply the shift or click on a day and drag the mouse across several days to apply the shift.



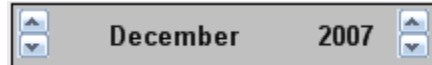
- 5 From the lower right corner next to the calendar, click **Apply Changes**.



The days are highlighted in bright blue to show the current shift assignment.

To Assign Shifts in Advance:

Use the following arrows located to the left and right of the month and year on the calendar to assign shifts in advance:



- Left Down Arrow – Takes you to the previous month.
- Left Up Arrow – Takes you to the next month.
- Right Down Arrow – Takes you to the previous year.
- Right Up Arrow – Takes you to the next year.

If you forget to assign a shift, it will appear in the reports as an error. You can edit the assigned shift and make corrections.

To Edit Assigned Shifts:

- 1 Click **Shifts/Assignment** from the lower left menu or **Employees > Assign Employees to Shifts**.
- 2 Click the company, employee, or department name to the shift you want to edit.
- 3 Click **Edit Shift**.
The **PayPunch [Shift Edit]** window displays.
- 4 Make changes to any of the fields
- 5 Click **OK** to save the changes to the shift; or **Cancel** to close the window without saving the information.
- 6 Click **Apply Changes**.

To Delete Assigned Shifts:

- 1 Click **Shifts/Assignment** from the lower left menu or **Employees > Assign Employees to Shifts**.
- 2 Click the company, employee, or department name in the **Employee Tree** pane.
- 3 Click **Delete Shift**.
A warning window displays asking if you want to delete the selected shift assignment.
- 4 Click **Yes** to delete the shift assignment; or **No** to close the window and keep the shift assignment.

Chapter 9 Managing Exceptions (*Enterprise Edition Only*)

This section details the following tasks for managing exceptions:

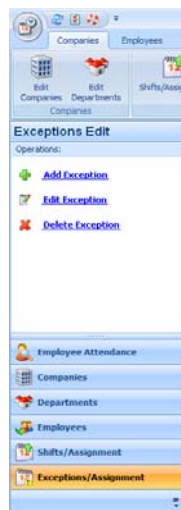
- [Create Exceptions](#)
- [Edit Exceptions](#)
- [Delete Exceptions](#)

Creating Exceptions

By default, exceptions are not pre-defined in the software. You must define your own, such as Paid Holiday, Paid Sick Day, Vacations, and so on.

To Add Exceptions:

- 1 Click **Exceptions/Assignment** from the lower left menu.



Or from the top menu, click **Employees > Assign Employees to Exceptions**.

- 2 From the left menu, click **Add Exception**.
The PayPunch **[Add New Exception]** window displays.



- 3 Type the **Exception Name** (*Examples:* Holiday, Sick Day, and Vacation).
- 4 Enter the number of Paid Hours that applies to the Exception.
- 5 Enter the Coefficient pay, which is the pay the employee receives if they do work on the exception day. For example, if you put 1.5 in this field and the employee works 6 hours on a day when the exception is assigned, their work hours will be multiplied by 1.5.
- 6 If the exception hours are to be included in overtime, click the check box. Otherwise, leave the box unchecked.
- 7 If the employee working hours on the day the exception is assigned are to be included in overtime calculations, click the check box. Otherwise, leave the box unchecked.
- 8 Click **Add** to create the exception and add another one, or click **OK** to add the exception and end the **Add New Exception** session. Click **Cancel** to close the window without saving the changes.

Editing Exceptions

To Edit an Exception:

- 1 Click **Shifts/Assignment** from the lower left menu.
- 2 Click **Edit Exception**.
The **PayPunch [Exception Edit]** window displays.
- 3 Make changes to any of the fields
- 4 Click **OK** to save the changes to the exception; or **Cancel** to close the window without saving the information.

Deleting Exceptions

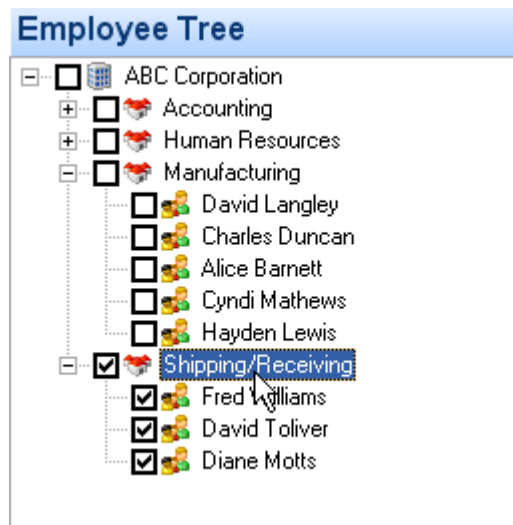
To Delete an Exception:

- 1 Click **Exceptions/Assignment** from the lower left menu.
- 2 Click the *Exception Name* in the **Exceptions** pane located on the right.
- 3 Click **Delete Exception**.
A warning window displays asking if you want to delete the selected exception.
- 4 Click **Yes** to delete the exception; or **No** to close the window and keep the exception.

Assigning Exceptions

To Assign Exceptions:

- 1 Click **Exceptions/Assignment** from the lower left menu or **Employees > Assign Employees to Exceptions** from the top menu.
- 2 Click the *Exception Name* in the **Exceptions** pane located on the right.
- 3 Click the check box of each Company, Department, or Employee in which to apply the selected Exception.



- 4 In the **Exceptions Assignment** pane, click a day to apply the exception or click on a day and drag the mouse across several days in which to apply the exception (such as, a week of vacation time).

5

Exceptions

Exception Name	Paid Hours	Coefficient
Holiday	8	1.50

Exceptions Assignment

Assigning group of employees to the "Holiday" exception.

January 2008

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Tuesday, January 1, 2008

Color Legend:

- No exception assigned
- Current exception assigned
- Other exception assigned
- Current exception assigned to some of selected employee(s)

Single mouse click on the calendar to add or remove exception assignment.
Hold the mouse button down and drag to add exception assignment to several days.

Apply Changes

6 From the lower right corner next to the calendar, click **Apply Changes**.

7 The following displays the Accounting department showing two holiday exceptions as two company-paid holidays. The boxes following the holiday exception indicates that one or more of the employees in the Accounting department are taking three vacation days.

PayPunch Enterprise

Companies Employees Reports Tools Help

Edit Employees Assign Employees to Shifts Assign Employees to Exceptions Employee Attendance

Exceptions Edit

Operations:

- Add Exception
- Edit Exception
- Delete Exception

Employee Tree

- ABC Enterprises
 - Accounting
 - Joe Sharp
 - Sue Moray
 - Jim Smart
 - Betty Bright
 - Customer Service
 - Human Resources
 - Manufacturing
 - Shipping
 - James Sutherland
 - Tammy Walters
 - Robert Johnson
- DEF Enterprises

Exceptions

Exception Name	Paid Hours	Coefficient
Holiday	8.00	1.50
Vacation	8.00	1.00

Exceptions Assignment

Assigning group of employees to the "Holiday" exception.

December 2007

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Monday, December 31, 2007

Color Legend:

- No exception assigned
- Current exception assigned
- Other exception assigned
- Current exception assigned to some of selected employee(s)

Single mouse click on the calendar to add or remove exception assignment.
Hold the mouse button down and drag to add exception assignment to several days.

Apply Changes

Accounting Period

From: Dec 1, 2007 12:00 AM To: Dec 31, 2007 11:59 PM

Date Range: Use defined Apply

The total number of exceptions in current company: 2.

Advanced Mode Role: General Supervisor 02/10/2008 10:46 AM

To Edit Assigned Exceptions:

- 1 Click **Exceptions/Assignment** from the lower left menu or **Employees > Assign Employees to Exceptions**.
- 2 Click the company, employee, or department name of the exception you want to edit.
- 3 Click **Edit Exception**.
The **PayPunch [Exception Edit]** window displays.
- 4 Make changes to any of the fields.
- 5 Click **OK** to save the changes to the exception; or **Cancel** to close the window without saving the information.
- 6 To change exception days, click the days the exception changes occur on the calendar. **Example:** If the employee has 3 days off marked on the calendar, but decided to take those days at another time, click on the current marked days to deselect, and add exceptions to the days the employee is now requesting.
- 7 Click **Apply Changes**.

To Delete Assigned Exceptions:

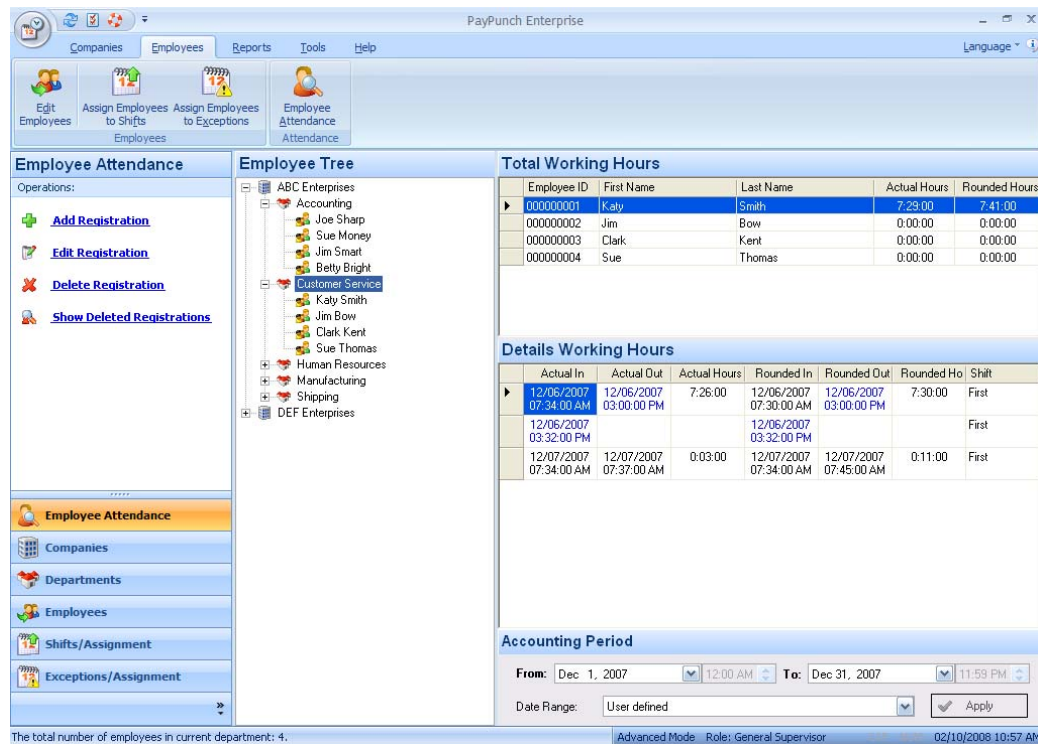
- 1 Click **Exceptions/Assignment** from the lower left menu or **Employees > Assign Employees to Exceptions**.
- 2 Click the company, employee, or department name in the **Employee Tree** pane.
- 3 Click **Delete Exception**.
A warning window displays asking if you want to delete the selected exception.
- 4 Click **Yes** to delete the exception, or **No** to close the window and keep the exception.

Chapter 10 Registering Employee Attendance

You can manage employees punch times by clicking the **Employee Attendance** icon in the Employees tab or the **Employee Attendance** button in the left menu pane.

In the **Details Working Hours** pane, the punch times in black are those that come through the device, or other registration methods, and are rounded based on the rules.

The times shown in blue are the manual inputs that are done when you need to register punch times (for example, an employee forgets to punch in or out; or punched in or out twice, etc.). Manual records do not get rounded.



The screenshot displays the PayPunch Enterprise software interface. The top menu bar includes 'Companies', 'Employees', 'Reports', 'Tools', and 'Help'. The left sidebar contains buttons for 'Edit Employees', 'Assign Employees to Shifts', 'Assign Employees to Exceptions', and 'Employee Attendance'. The main window is divided into three panes:

- Employee Attendance**: Contains links for 'Add Registration', 'Edit Registration', 'Delete Registration', and 'Show Deleted Registrations'.
- Employee Tree**: A hierarchical list of departments and employees. The 'Customer Service' department is expanded, showing employees: Katy Smith, Jim Bow, Clark Kent, Sue Thomas, Human Resources, Manufacturing, Shipping, and DEF Enterprises.
- Total Working Hours**: A table showing employee punch times and hours.

Employee ID	First Name	Last Name	Actual Hours	Rounded Hours
000000001	Katy	Smith	7:29:00	7:41:00
000000002	Jim	Bow	0:00:00	0:00:00
000000003	Clark	Kent	0:00:00	0:00:00
000000004	Sue	Thomas	0:00:00	0:00:00

Details Working Hours

	Actual In	Actual Out	Actual Hours	Rounded In	Rounded Out	Rounded Ho	Shift
12/06/2007 07:34:00 AM	12/06/2007 03:00:00 PM	7:26:00	12/06/2007 07:30:00 AM	12/06/2007 03:00:00 PM	7:30:00	First	
12/06/2007 03:32:00 PM			12/06/2007 03:32:00 PM			First	
12/07/2007 07:34:00 AM	12/07/2007 07:37:00 AM	0:03:00	12/07/2007 07:34:00 AM	12/07/2007 07:45:00 AM	0:11:00	First	

Accounting Period

From: Dec 1, 2007 12:00 AM To: Dec 31, 2007 11:59 PM

Date Range: User defined Apply

The total number of employees in current department: 4. Advanced Mode Role: General Supervisor 02/10/2008 10:57 AM

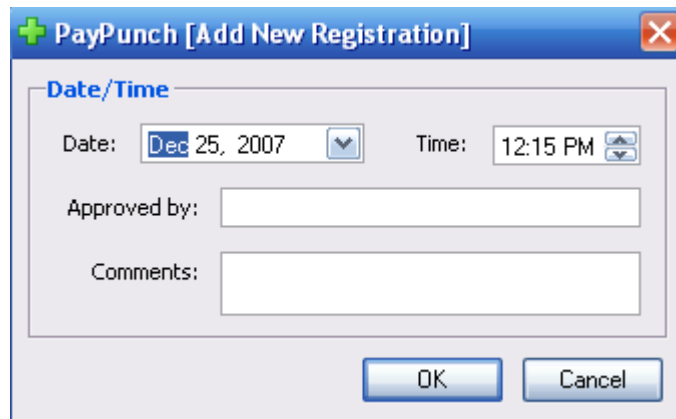
The following procedures describe how to use the following menu selections:

- [Add Registration](#) – Use when an employee forgets to punch in or out.
- [Edit Registration](#) – Use to change punch in or out times.
- [Delete Registration](#) – Use to delete incorrect punch times.

- [Viewing Attendance Change History](#) – Use to view the details of changes to punch times.
- [Show Deleted Registrations](#) – Use to show a list of all deleted punch times.

Adding a Registration

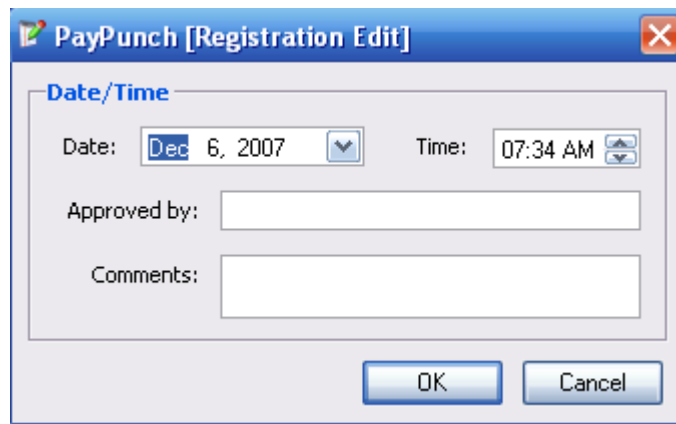
- 1 Click the **Employees** tab from the top menu and **Employee Attendance**; or click **Employee Attendance** from the lower left menu.
- 2 Click **Add Registration**.
The **PayPunch [Add New Registration]** window displays.



- 3 To add the punch time, select the date and time.
- 4 Enter the name of the person approving the time (*Optional*).
Note: History is available only in the Professional and Enterprise Editions when the **Track changes** option box is selected.
- 5 Type the reason for the added time (*Optional*).
Note: History is available only in the Professional and Enterprise Editions when the **Track changes** option box is selected.
- 6 Click **OK** to accept the changes or **Cancel** to discard.

Editing a Registration

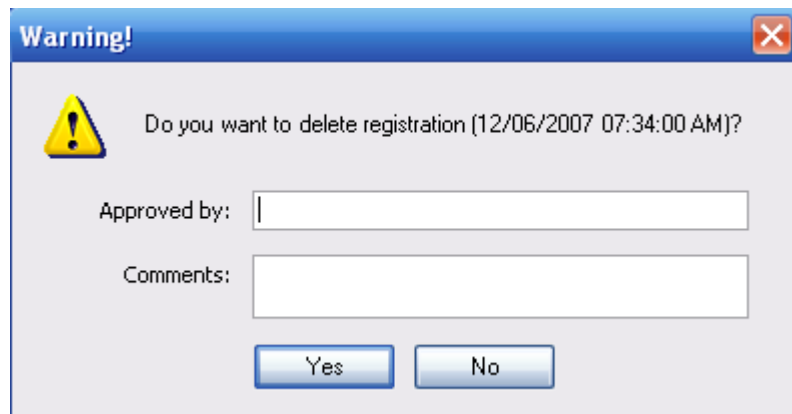
- 1 Click the **Employees** tab from the top menu and **Employee Attendance**; or click **Employee Attendance** from the lower left menu.
- 2 Click **Edit Registration**.
The **PayPunch [Registration Edit]** window displays.



- 3 To replace the current punch time, enter the new date and/or time.
- 4 Enter the name of the person approving the edited time (*Optional*).
Note: History is available only in the Professional and Enterprise Editions when the **Track changes** option box is selected.
- 5 Type the reason for the updated time (*Optional*).
Note: History is available only in the Professional and Enterprise Editions when the **Track changes** option box is selected.
- 6 Click **OK** to accept the changes or **Cancel** to discard.

Deleting a Registration

- 1 Click the **Employees** tab from the top menu and **Employee Attendance**; or click **Employee Attendance** from the lower left menu.
- 2 Click **Delete Registration**.
The **Warning** window displays.



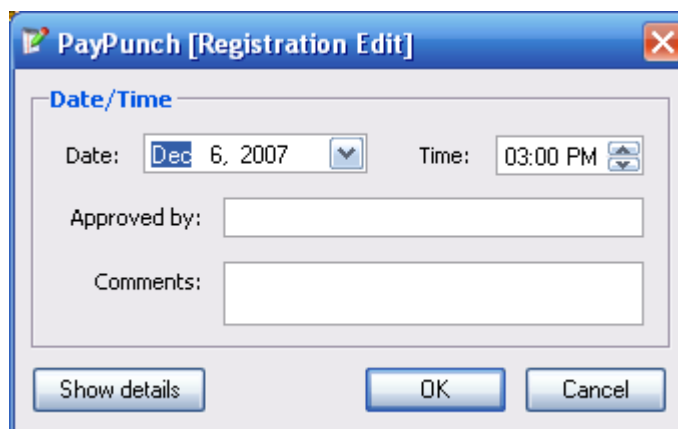
- 3 Enter the name of the person approving the deleted punch time (*Optional*).
Note: History is available only in the Professional and Enterprise Editions when the **Track changes** option box is selected.
- 4 Type the reason for deleting the time (*Optional*).
Note: History is available only in the Professional and Enterprise Editions when the **Track changes** option box is selected.
- 5 Click **Yes** to delete the punch time or **No**.

Viewing Attendance Change History

- 1 Click the **Employees** tab from the top menu and **Employee Attendance**; or click **Employee Attendance** from the lower left menu.
- 2 Double-click on the blue time input (manual input).

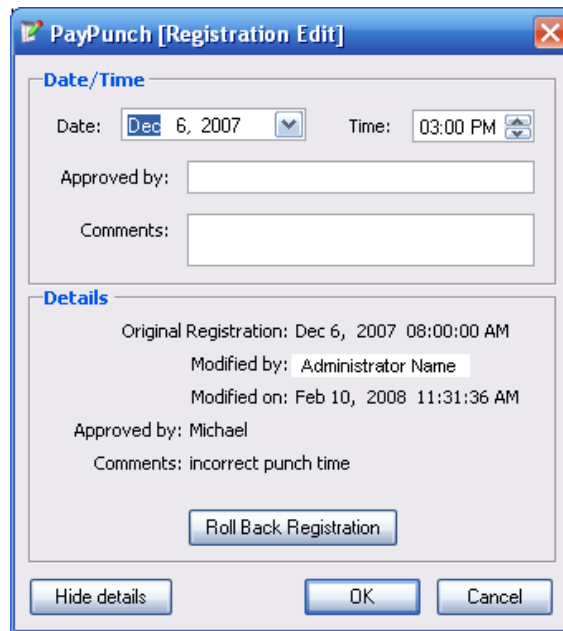
Details Working Hours							
	Actual In	Actual Ou	Actual Ho	Rounded I	Rounded	Rounded	Shift
	12/06/200 07:34:00	12/06/200 03:00:00	7:26:00	12/06/200 07:30:00	12/06/200 03:00:00	7:30:00	First
►	12/06/200 03:32:00			12/06/200 03:32:00			First
	12/07/200 07:34:00	12/07/200 07:37:00	0:03:00	12/07/200 07:34:00	12/07/200 07:45:00	0:11:00	First

The **PayPunch [Registration Edit]** window displays.



The screenshot shows the 'PayPunch [Registration Edit]' window. It has a title bar with a close button. Inside, there's a 'Date/Time' section with a date picker set to 'Dec 6, 2007' and a time dropdown set to '03:00 PM'. Below this are text input fields for 'Approved by:' and 'Comments:'. At the bottom, there are three buttons: 'Show details', 'OK', and 'Cancel'.

- 3 Click the **Show details** button to view the time input history. The **PayPunch [Registration Edit]** window extends to show the details of the time input, including the original time record.



PayPunch [Registration Edit]

Date/Time

Date: Dec 6, 2007 Time: 03:00 PM

Approved by:

Comments:

Details

Original Registration: Dec 6, 2007 08:00:00 AM
Modified by: Administrator Name
Modified on: Feb 10, 2008 11:31:36 AM
Approved by: Michael
Comments: incorrect punch time

Roll Back Registration

Hide details OK Cancel

- 4 To return the time to the **Original Registration** (in the displayed example: **8:00 AM**), click the **Roll Back Registration** button. The record displays the original punch time of 8:00 AM in the **Details Working Hours** pane for the selected employee.
- 5 If you want to leave the time as is, click **OK**.

Showing Deleted Registrations

- 1 Click the **Employees** tab from the top menu and **Employee Attendance**; or click **Employee Attendance** from the lower left menu.
- 2 Click **Show Deleted Registrations**.
The **Deleted Records** window displays.



Deleted Records

Deleted records from Dec 1, 2007 to Jan 1, 2008

Employee ID	Employee Name	Date	Time	Deleted By	Deleted On	Approved By	Comments	Undo
000000001	Katy Smith	12/07/2007	07:34:00 AM	Sherry Delling	12/07/2007 07:35:54 PM	va		<input checked="" type="checkbox"/>
000000001	Katy Smith	12/06/2007	06:00:00 PM	Sherry Delling	12/15/2007 06:37:58 PM	Michael	Incorrect input of time by supervisor.	<input type="checkbox"/>
000000003	Clark Kent	12/06/2007	06:00:00 PM	Sherry Delling	12/15/2007 06:40:17 PM	Michael	Incorrect punch time by employee.	<input type="checkbox"/>
000000005	Sally Smith	12/10/2007	05:06:48 PM	Sherry Delling	12/18/2007 02:25:40 PM	Michael	Time entered incorrectly	<input type="checkbox"/>
000000008	David Walters	12/10/2007	07:36:48 PM	Sherry Delling	12/18/2007 02:36:00 PM	Michael	Punched in at the wrong time.	<input type="checkbox"/>
000000008	David Walters	12/10/2007	03:36:48 AM	Sherry Delling	12/18/2007 02:37:10 PM	Michael	Punched in too early.	<input type="checkbox"/>
000000013	Charlie Winters	12/10/2007	06:59:16 AM	Sherry Delling	12/18/2007 02:43:56 PM	Michael	Wrong punch time.	<input type="checkbox"/>
000000013	Charlie Winters	12/10/2007	06:47:11 PM	Sherry Delling	12/18/2007 02:44:14 PM	Michael	Employee accidently punched out.	<input type="checkbox"/>
000000013	Charlie Winters	12/10/2007	06:59:16 PM	Sherry Delling	12/18/2007 02:44:30 PM	Michael	Wrong punch time.	<input type="checkbox"/>

Amount of selected records: 0

Undo Selected OK Cancel

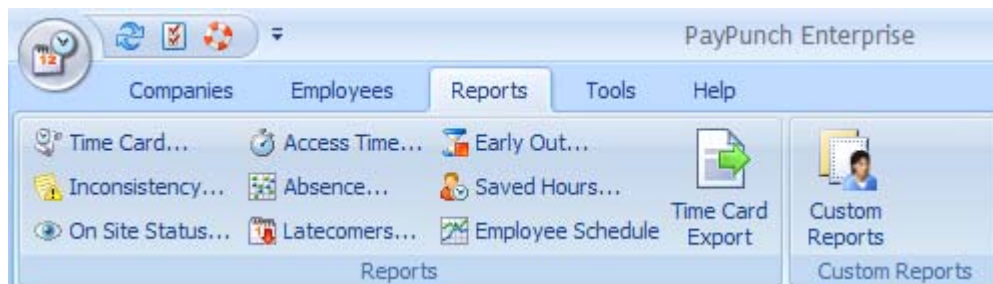
- 3 If you need to undo a deleted time:
Click to check the **Undo** box next to the time you don't want deleted.
- 4 Click the **Undo Selected** button.
The record no longer appears in the **Deleted Records** window and the original device time reappears in the **Details Working Hours** pane for the selected employee.
- 5 Click **OK**.

Chapter 11 Generating Reports

This section covers the following PayPunch reports:

- [Time Card Report](#)
- [Inconsistency Report](#)
- [On Site Status Report](#)
- [Access Time Report](#)
- [Absence Report](#)
- [Latecomers Report](#)
- [Early Out Report](#)
- [Saved Hours Report](#)
- [Employee Schedule Report](#)

Access the reports from the **Reports** tab in the top menu.



The following table describes each report type.

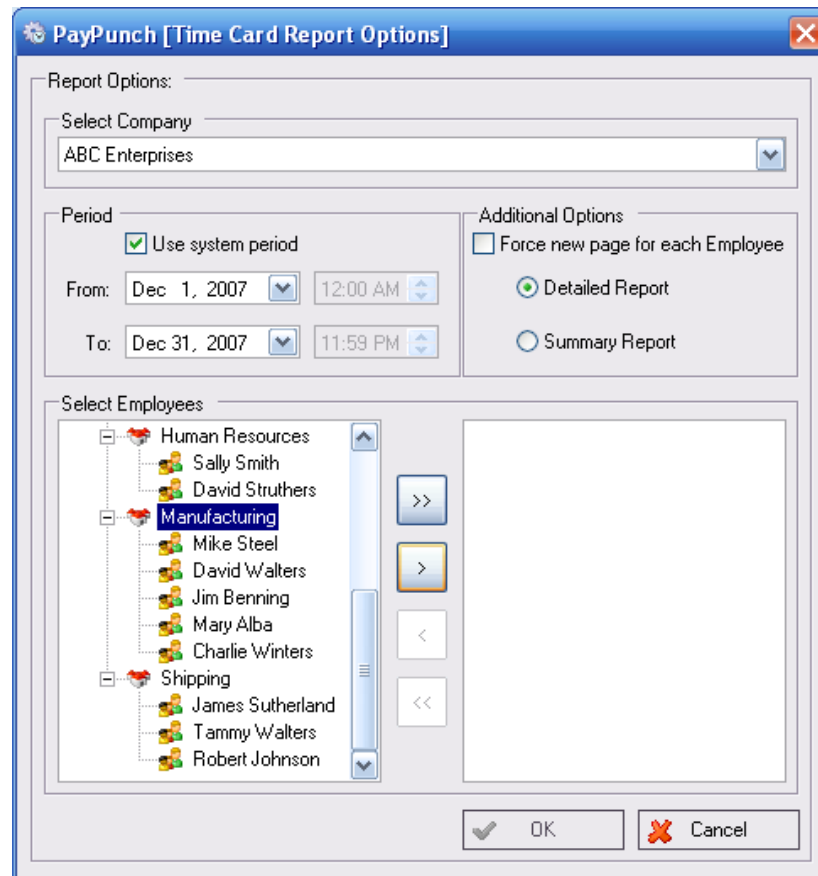
Report	Description
Time Card	This is the main report that allows a choice of viewing a Detailed Report (shows the day-by-day details) or a Summary Report (skips the details and only shows

Report	Description
	overall hours worked).
Inconsistency	Shows a list of records that have problems, such as records missing a punch out or an unidentified record designated by red question marks (??), so you can go into PayPunch and correct the problems.
On Site Status	Shows a list of employees that are currently working. Also, you can use this report to view employees who have not arrived for their shift.
Access Time	Simply gives you a list of punches, which can be used to check the biometric device.
Absence	Shows a list of employees who do not report for their assigned shift.
Latecomers	Shows a list of employees who arrive after their shift begins.
Early Out	Shows a list of employees who are leaving before their shift ends.
Saved Hours	Allows you to view if you are gaining or losing time because of a rounding rule so you can adjust the rounding in the Shifts/Assignment .
Employee Schedule	This report allows you to view the schedules for one person, one department, or the entire company.
Time Card Export	This report allows you to export the Time Card Report to CSV or Excel format.
Custom Reports	You can create or modify existing reports. This is an advanced option that requires coding knowledge.

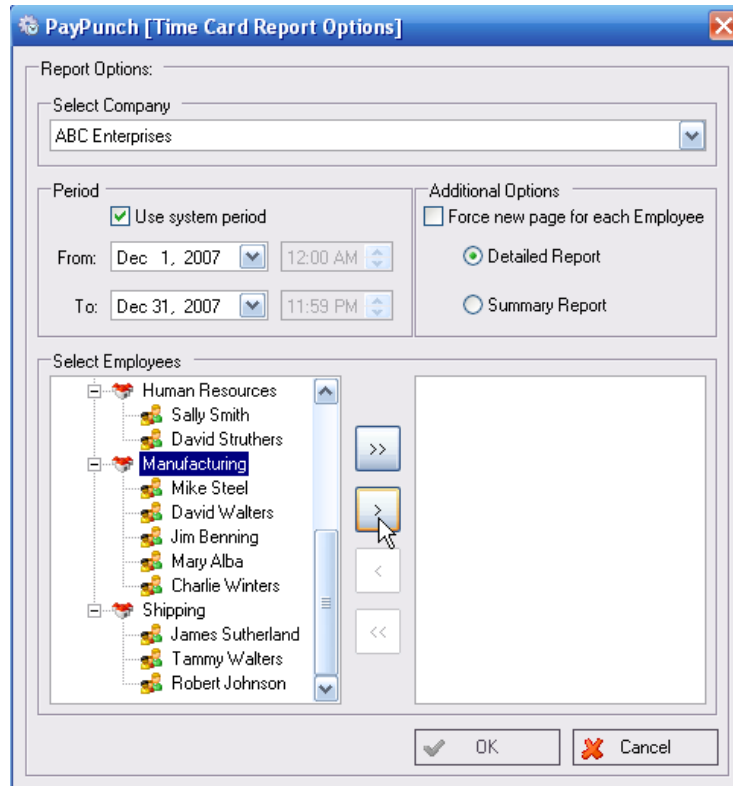
The following sections show examples of each of the reports.

Time Card Report

When you select a report to view, the **PayPunch [Time Card Report Options]** window displays where you can choose what time specifics to include in the report and the company, departments, and/or employees you want to see in the report. The following is an example of the **Time Card Report Options** window.



- 1 Click the company, department, or employee to include in the report. The example shows that the report will only include the Manufacturing department.



- 2 Click the single right arrow to move the manufacturing employees to the right pane.
- 3 Alternatively, you can click the double-right arrows to move all employees to the right pane.
- 4 Click **OK**.
The report displays. You can save, print, or close the report.

The following is an example of the detailed **Time Card Report**.

Time Card Report

ABC Enterprises

Accounting Period: from **December 01, 2007** to **December 31, 2007**

Accounting					
000000009 - Joe Sharp				Hours	Shift/Exception
Monday	12/24/2007	Exception	8:00:00		Holiday
Tuesday	12/25/2007	Exception	8:00:00		Holiday
Break Hours:	0:00:00	Regular Hours:	16:00:00		
Working Hours:	0:00:00	Overtime Hours:	0:00:00		
Exception Hours:	16:00:00	Paid Hours:	16:00:00		
Holiday	16:00:00				
000000015 - Jim Smart				Hours	Shift/Exception
Monday	12/24/2007	Exception	8:00:00		Holiday
Tuesday	12/25/2007	Exception	8:00:00		Holiday
Wednesday	12/26/2007	Exception	8:00:00		Vacation
Thursday	12/27/2007	Exception	8:00:00		Vacation
Friday	12/28/2007	Exception	8:00:00		Vacation
Break Hours:	0:00:00	Regular Hours:	40:00:00		
Working Hours:	0:00:00	Overtime Hours:	0:00:00		
Exception Hours:	40:00:00	Paid Hours:	40:00:00		
Holiday	16:00:00				
Vacation	24:00:00				
000000018 - Betty Bright				Hours	Shift/Exception
Monday	12/24/2007	Exception	8:00:00		Holiday
Tuesday	12/25/2007	Exception	8:00:00		Holiday
Break Hours:	0:00:00	Regular Hours:	16:00:00		
Working Hours:	0:00:00	Overtime Hours:	0:00:00		
Exception Hours:	16:00:00	Paid Hours:	16:00:00		
Holiday	16:00:00				
Department Sub Total					
Break Hours:	0:00:00	Regular Hours:	72:00:00		
Working Hours:	0:00:00	Overtime Hours:	0:00:00		
Exception Hours:	72:00:00	Paid Hours:	72:00:00		
Holiday	48:00:00				
Vacation	24:00:00				

Inconsistency Report

The following displays an Inconsistency Report showing that Katy punched in after her designated shift.

Inconsistency Report				
ABC Enterprises				
Accounting Period: from December 01, 2007 to December 31, 2007				
Customer Service				
000000001 - Katy Smith			Registration Time	Shift
	Thursday	12/06/2007	03:32:00 PM	First
	Friday	12/07/2007	07:45:00 AM	First
000000003 - Clark Kent			Registration Time	Shift
	Thursday	12/06/2007	08:00:00 AM	First
Manufacturing				
000000007 - Mike Steel			Registration Time	Shift
	Monday	12/10/2007	06:06:48 PM	???
000000009 - Patty Jones			Registration Time	Shift
	Monday	12/10/2007	10:52:28 PM	???

On Site Status Report

The following displays an On Site Status Report.

Inconsistency Report				
ABC Enterprises				
Accounting Period: from December 01, 2007 to December 31, 2007				
Customer Service				
000000001 - Katy Smith			Registration Time	Shift
	Thursday	12/06/2007	03:32:00 PM	First
	Friday	12/07/2007	07:45:00 AM	First
000000003 - Clark Kent			Registration Time	Shift
	Thursday	12/06/2007	08:00:00 AM	First
Manufacturing				
000000007 - Mike Steel			Registration Time	Shift
	Monday	12/10/2007	06:06:48 PM	???
000000009 - Patty Jones			Registration Time	Shift
	Monday	12/10/2007	10:52:28 PM	???

Access Time Report

The following is an example of an Access Time Report.

Access Time Report			
ABC Enterprises			
Accounting Period: from	December 01, 2007	to	December 31, 2007
Customer Service			
000000001 - Katy Smith			Actual In
	Thursday	12/06/2007	07:34:00 AM
	Thursday	12/06/2007	03:00:00 PM
	Thursday	12/06/2007	03:32:00 PM
	Friday	12/07/2007	07:37:00 AM
000000003 - Clark Kent			Actual In
	Thursday	12/06/2007	08:00:00 AM
Human Resources			
000000005 - Sally Smith			Actual In
	Monday	12/10/2007	07:15:09 AM
	Monday	12/10/2007	03:06:48 PM
Manufacturing			
000000007 - Mike Steel			Actual In
	Monday	12/10/2007	02:06:48 PM
	Monday	12/10/2007	03:36:48 PM
	Monday	12/10/2007	06:06:48 PM
000000008 - David Walters			Actual In
	Monday	12/10/2007	07:36:00 AM
	Monday	12/10/2007	03:36:48 PM
000000009 - Patty Jones			Actual In
	Monday	12/10/2007	06:45:14 AM
	Monday	12/10/2007	04:07:31 PM
	Monday	12/10/2007	10:52:28 PM
000000011 - Mary Alba			Actual In
	Monday	12/10/2007	03:01:10 PM
	Monday	12/10/2007	03:11:11 PM
	Monday	12/10/2007	10:57:06 PM
	Monday	12/10/2007	11:05:07 PM
000000013 - Charlie Winters			Actual In
	Monday	12/10/2007	10:52:28 PM
	Monday	12/10/2007	10:59:16 PM

Absence Report

The following is an example of the Absence Report.

Absence Report			
ABC Enterprises			
Accounting Period: from December 01, 2007 to December 31, 2007			
Customer Service			
000000001 - Katy Smith	Date	Shift Name	Exception
Monday	12/03/2007	First	
Tuesday	12/04/2007	First	
Wednesday	12/05/2007	First	
Monday	12/10/2007	First	
Tuesday	12/11/2007	First	
Wednesday	12/12/2007	First	
Thursday	12/13/2007	First	
Friday	12/14/2007	First	
Monday	12/17/2007	First	
Tuesday	12/18/2007	First	
Wednesday	12/19/2007	First	
Thursday	12/20/2007	First	
Friday	12/21/2007	First	
Monday	12/24/2007	First	Holiday
Tuesday	12/25/2007	First	Holiday
Wednesday	12/26/2007	First	
Thursday	12/27/2007	First	
Friday	12/28/2007	First	
Exception Day(s)	2		
Missing Day(s)	16		
000000002 - Jim Bow	Date	Shift Name	Exception
Monday	12/03/2007	First	
Tuesday	12/04/2007	First	
Wednesday	12/05/2007	First	
Thursday	12/06/2007	First	
Friday	12/07/2007	First	
Monday	12/10/2007	First	
Tuesday	12/11/2007	First	
Wednesday	12/12/2007	First	
Thursday	12/13/2007	First	
Friday	12/14/2007	First	
Monday	12/17/2007	First	
Tuesday	12/18/2007	First	
---	---	---	---

Latecomers Report

The following is an example of the Latecomers Report showing when the shift began and who punched in after the shift start.

Latecomers Report					
ABC Enterprises					
Accounting Period: from December 01, 2007 to December 31, 2007					
Customer Service					
000000001 - Katy Smith			Shift Begin	Registration In	Shift Name
Thursday	12/06/2007	07:00:00 AM	07:34:00 AM	First	
Friday	12/07/2007	07:00:00 AM	07:37:00 AM	First	
Amount of delays:	2				
000000003 - Clark Kent			Shift Begin	Registration In	Shift Name
Thursday	12/06/2007	07:00:00 AM	08:00:00 AM	First	
Amount of delays:	1				
Sub Total					
Amount of delays:	3				
Human Resources					
000000005 - Sally Smith			Shift Begin	Registration In	Shift Name
Monday	12/10/2007	07:00:00 AM	07:15:09 AM	First	
Amount of delays:	1				
Sub Total					
Amount of delays:	1				
Manufacturing					
000000007 - Mike Steel			Shift Begin	Registration In	Shift Name
Monday	12/10/2007	07:00:00 AM	02:06:48 PM	First	
Amount of delays:	1				
000000008 - David Walters			Shift Begin	Registration In	Shift Name
Monday	12/10/2007	07:00:00 AM	07:36:00 AM	First	
Amount of delays:	1				
000000011 - Mary Alba			Shift Begin	Registration In	Shift Name
Monday	12/10/2007	03:00:00 PM	03:01:10 PM	Second	
Amount of delays:	1				
Sub Total					
Amount of delays:	3				
Total					
Amount of delays:	7				

Early Out Report

The following is an example of the Early Out Report showing who punched out before their shift ended.

Early Out Report				
ABC Enterprises				
Accounting Period: from December 01, 2007 to December 31, 2007				
Human Resources				
000000005 - Sally Smith		Shift End	Registration Out	Shift Name
Monday	12/10/2007	03:30:00 PM	03:06:48 PM	First
Amount of Early Out:		1		
Sub Total				
Amount of Early Out:		1		
Manufacturing				
000000013 - Charlie Winters		Shift End	Registration Out	Shift Name
Monday	12/10/2007	07:00:00 AM	10:59:16 PM	Third
Amount of Early Out:		1		
Sub Total				
Amount of Early Out:		1		
Total				
Amount of Early Out:		2		

Saved Hours Report

The following is an example of the Saved Hours Report, resulting from the rounding rules.

Saved Hours Report						
ABC Enterprises						
Accounting Period: from December 01, 2007 to December 31, 2007						
Customer Service						
000000001 - Katy Smith		Shift Name	Actual	Rounded	Saved Hours	
Thursday	12/06/2007	First	7:26:00	7:30:00	-0:04:00	
Saved Hours:		-0:04:00				
Sub Total						
Saved Hours:		-0:04:00				
Human Resources						
000000005 - Sally Smith		Shift Name	Actual	Rounded	Saved Hours	
Monday	12/10/2007	First	7:51:39	7:45:00	0:06:39	
Saved Hours:		0:06:39				
Sub Total						
Saved Hours:		0:06:39				
Manufacturing						
000000007 - Mike Steel		Shift Name	Actual	Rounded	Saved Hours	
Monday	12/10/2007	First	1:30:00	1:15:00	0:15:00	
Saved Hours:		0:15:00				
000000008 - David Walters		Shift Name	Actual	Rounded	Saved Hours	
Monday	12/10/2007	First	8:00:48	7:54:00	0:06:48	
Saved Hours:		0:06:48				
000000009 - Patty Jones		Shift Name	Actual	Rounded	Saved Hours	
Monday	12/10/2007	First	9:22:17	9:15:00	0:07:17	
Saved Hours:		0:07:17				
000000011 - Mary Alba		Shift Name	Actual	Rounded	Saved Hours	
Monday	12/10/2007	Second	0:18:02	0:15:00	0:03:02	
Saved Hours:		0:03:02				
000000013 - Charlie Winters		Shift Name	Actual	Rounded	Saved Hours	
Monday	12/10/2007	Third	0:06:48	-0:15:00	0:21:48	
Saved Hours:		0:21:48				
Sub Total						
Saved Hours:		0:53:55				
Total						
Saved Hours:		0:56:34				

Employee Schedule Report

The following shows an example of the Employee Schedule Report.

Employee Schedule				
ABC Enterprises				
Accounting Period: from December 01, 2007 to December 31, 2007				
Customer Service				
000000001 - Katy Smith		Shift/Exception Name	Shift Start	Shift End
Monday	12/03/2007	First	07:00 AM	03:30 PM
Tuesday	12/04/2007	First	07:00 AM	03:30 PM
Wednesday	12/05/2007	First	07:00 AM	03:30 PM
Thursday	12/06/2007	First	07:00 AM	03:30 PM
Friday	12/07/2007	First	07:00 AM	03:30 PM
Monday	12/10/2007	First	07:00 AM	03:30 PM
Tuesday	12/11/2007	First	07:00 AM	03:30 PM
Wednesday	12/12/2007	First	07:00 AM	03:30 PM
Thursday	12/13/2007	First	07:00 AM	03:30 PM
Friday	12/14/2007	First	07:00 AM	03:30 PM
Monday	12/17/2007	First	07:00 AM	03:30 PM
Tuesday	12/18/2007	First	07:00 AM	03:30 PM
Wednesday	12/19/2007	First	07:00 AM	03:30 PM
Thursday	12/20/2007	First	07:00 AM	03:30 PM
Friday	12/21/2007	First	07:00 AM	03:30 PM
Monday	12/24/2007	First Holiday	07:00 AM	03:30 PM
Tuesday	12/25/2007	First Holiday	07:00 AM	03:30 PM
Wednesday	12/26/2007	First	07:00 AM	03:30 PM
Thursday	12/27/2007	First	07:00 AM	03:30 PM
Friday	12/28/2007	First	07:00 AM	03:30 PM
Monday	12/31/2007	Holiday		
000000002 - Jim Bow		Shift/Exception Name	Shift Start	Shift End
Monday	12/03/2007	First	07:00 AM	03:30 PM
Tuesday	12/04/2007	First	07:00 AM	03:30 PM
Wednesday	12/05/2007	First	07:00 AM	03:30 PM
Thursday	12/06/2007	First	07:00 AM	03:30 PM
Friday	12/07/2007	First	07:00 AM	03:30 PM
Monday	12/10/2007	First	07:00 AM	03:30 PM
Tuesday	12/11/2007	First	07:00 AM	03:30 PM
Wednesday	12/12/2007	First	07:00 AM	03:30 PM
Thursday	12/13/2007	First	07:00 AM	03:30 PM
Friday	12/14/2007	First	07:00 AM	03:30 PM

The next example shows that the report continues and includes all three shifts.

Wednesday	12/26/2007	Second	03:00 PM	11:00 PM
Thursday	12/27/2007	Second	03:00 PM	11:00 PM
Friday	12/28/2007	Second	03:00 PM	11:00 PM
Monday	12/31/2007	Holiday		
000000011 - Mary Alba		Shift/Exception Name	Shift Start	Shift End
Monday	12/03/2007	Second	03:00 PM	11:00 PM
Tuesday	12/04/2007	Second	03:00 PM	11:00 PM
Wednesday	12/05/2007	Second	03:00 PM	11:00 PM
Thursday	12/06/2007	Second	03:00 PM	11:00 PM
Friday	12/07/2007	Second	03:00 PM	11:00 PM
Monday	12/10/2007	Second	03:00 PM	11:00 PM
Tuesday	12/11/2007	Second	03:00 PM	11:00 PM
Wednesday	12/12/2007	Second	03:00 PM	11:00 PM
Thursday	12/13/2007	Second	03:00 PM	11:00 PM
Friday	12/14/2007	Second	03:00 PM	11:00 PM
Monday	12/17/2007	Second	03:00 PM	11:00 PM
Tuesday	12/18/2007	Second	03:00 PM	11:00 PM
Wednesday	12/19/2007	Second	03:00 PM	11:00 PM
Thursday	12/20/2007	Second	03:00 PM	11:00 PM
Friday	12/21/2007	Second	03:00 PM	11:00 PM
Monday	12/24/2007	Second	03:00 PM	11:00 PM
		Holiday		
Tuesday	12/25/2007	Second	03:00 PM	11:00 PM
		Holiday		

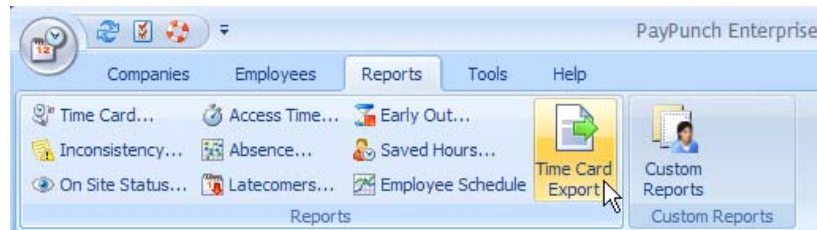
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Wednesday	12/26/2007	Second	03:00 PM	11:00 PM
Thursday	12/27/2007	Second	03:00 PM	11:00 PM
Friday	12/28/2007	Second	03:00 PM	11:00 PM
Monday	12/31/2007	Holiday		
000000012 - Stormy McCombs		Shift/Exception Name	Shift Start	Shift End
Monday	12/03/2007	Third	11:00 PM	07:00 AM
Tuesday	12/04/2007	Third	11:00 PM	07:00 AM
Wednesday	12/05/2007	Third	11:00 PM	07:00 AM
Thursday	12/06/2007	Third	11:00 PM	07:00 AM
Friday	12/07/2007	Third	11:00 PM	07:00 AM
Monday	12/10/2007	Third	11:00 PM	07:00 AM
Tuesday	12/11/2007	Third	11:00 PM	07:00 AM
Wednesday	12/12/2007	Third	11:00 PM	07:00 AM

Time Card Export Report

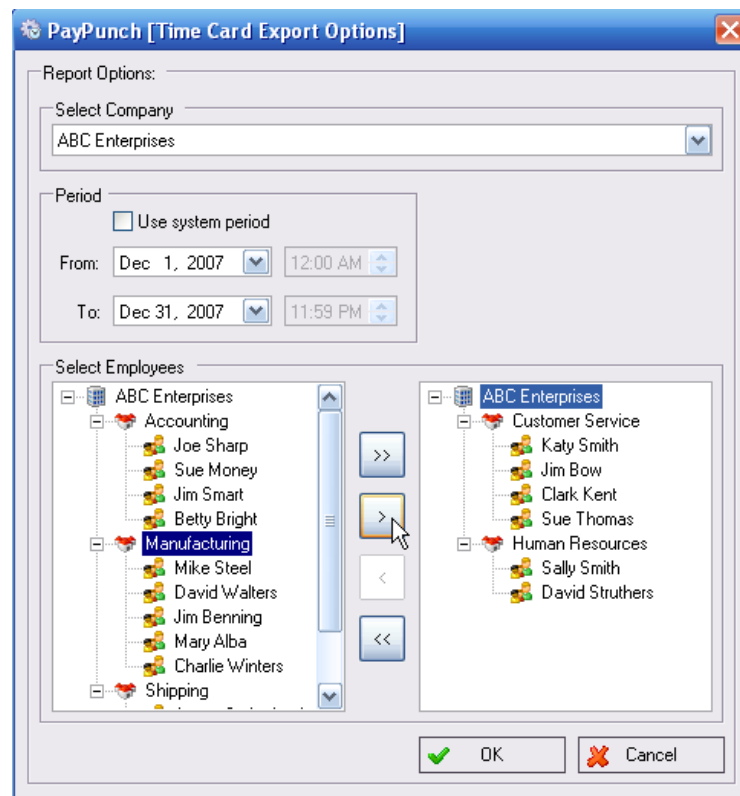
- 1 You can export the Time Card Report data to a CSV, MS Excel, or other file types.

From the top menu, click **Reports > Time Card Export**.



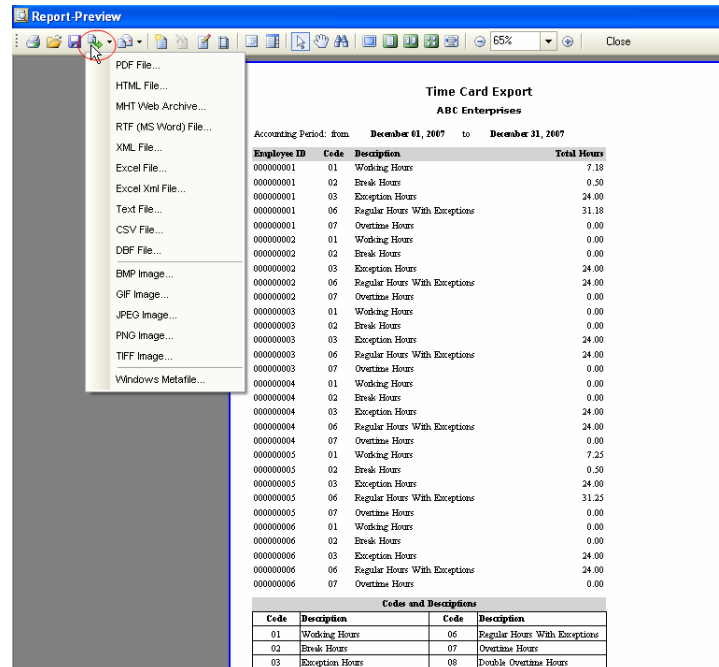
The **PayPunch [Time Card Export Options]** window displays.

- 2 Click the company, department, or employee to include in the report. The example shows that the report will only include the Customer Service and Human Resources departments.

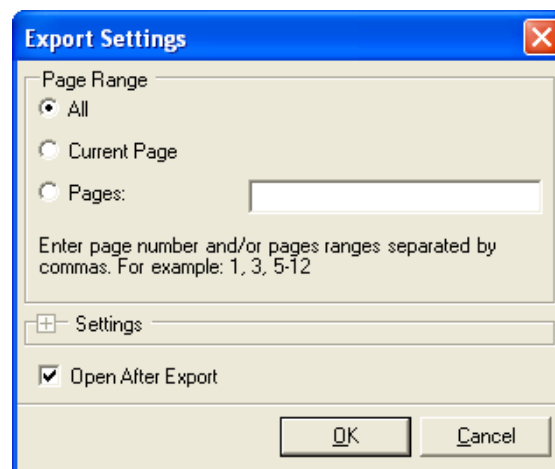


- 3 Click the single right arrow to move the employees to the right pane, which gets included in the report.

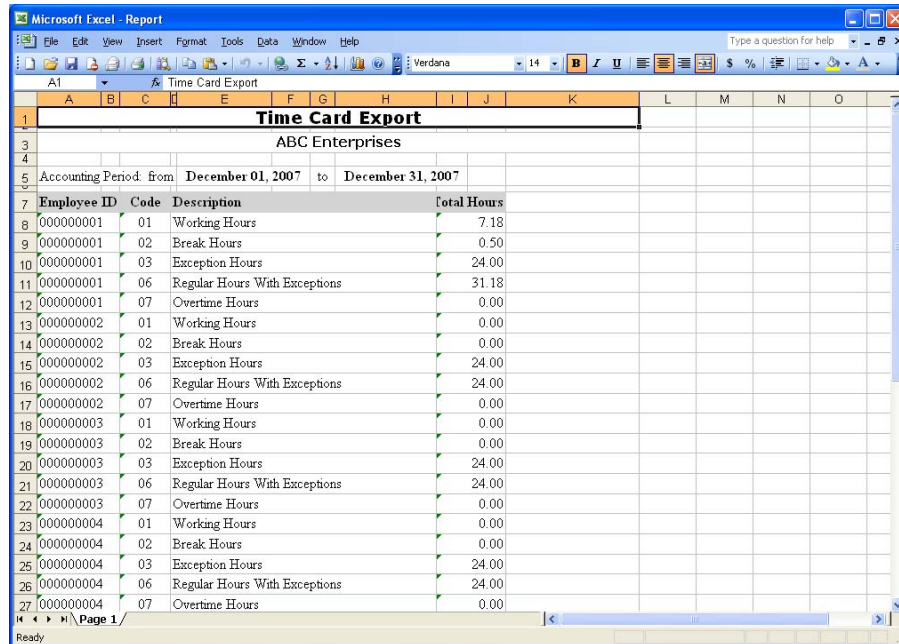
- 4 Alternatively, you can click the double-right arrows to move all employees to the right pane.
- 5 Click **OK**.
The **Time Card Export Report** displays with the option in the top toolbar to choose the export option.



- 6 Choose the file type in which to export the Time Card Report.
- 7 Complete the **Export Settings** fields.



- 8 Type a name for the report and click **Save**.
- 9 The following example shows a Time Card Report exported to an MS Excel spreadsheet.



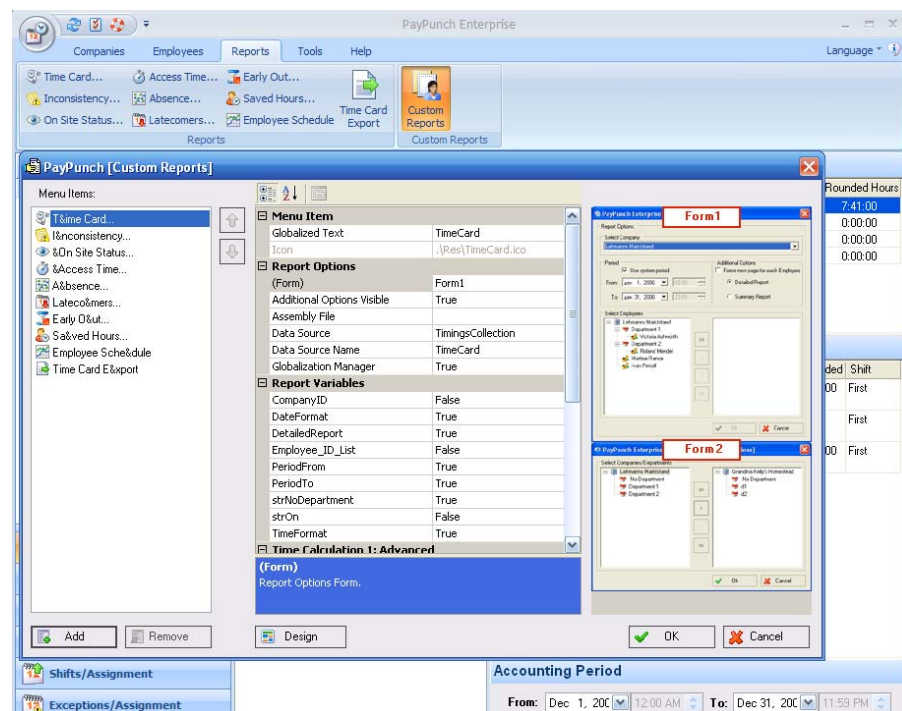
Time Card Export			
ABC Enterprises			
Accounting Period: from December 01, 2007 to December 31, 2007			
Employee ID	Code	Description	Total Hours
000000001	01	Working Hours	7.18
000000001	02	Break Hours	0.50
000000001	03	Exception Hours	24.00
000000001	06	Regular Hours With Exceptions	31.18
000000001	07	Overtime Hours	0.00
000000002	01	Working Hours	0.00
000000002	02	Break Hours	0.00
000000002	03	Exception Hours	24.00
000000002	06	Regular Hours With Exceptions	24.00
000000002	07	Overtime Hours	0.00
000000003	01	Working Hours	0.00
000000003	02	Break Hours	0.00
000000003	03	Exception Hours	24.00
000000003	06	Regular Hours With Exceptions	24.00
000000003	07	Overtime Hours	0.00
000000004	01	Working Hours	0.00
000000004	02	Break Hours	0.00
000000004	03	Exception Hours	24.00
000000004	06	Regular Hours With Exceptions	24.00
000000004	07	Overtime Hours	0.00

Custom Reports

Custom Reports is an advanced feature that should only be used by technical personnel who have the coding knowledge to design original reports.

To Design a Report:

- 1 From the top menu, click **Reports > Custom Reports**. The **PayPunch [Custom Reports]** window displays.



- 2 Click the **Design** button at the bottom of the window. The **Report Design** window displays.
- 3 Click a Time Calculation and click **OK**. The **PayPunch [Time Card Report Options]** window displays.
- 4 Choose your options and click **OK**. A report designer displays where you can create your own report.

For more information on using the design software, refer to StimulReport at the following URL: <http://www.stimulsoft.com>

Chapter 12 Obtaining Technical Assistance


Xpress Software is committed to providing excellence in customer service.

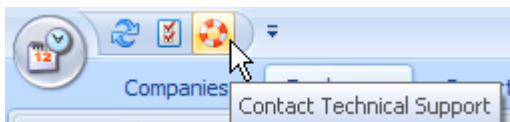
From anywhere in the PayPunch.com web site, click **Support** from the orange menu bar.



The support page provides the following support options:

- Phone number: 1-888-777-0388.
- Support hours: Monday through Friday 9:00 am – 6:00 pm EST
- Email and Live support: support@paypunch.com
- Links to PayPunch Guides
- FAQs
- Device manuals
- Tutorials

You can also contact Technical Support while working in PayPunch by clicking the Support icon  located in the top left portion of the top menu.



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